SUNGARD SCT HIGHER EDUCATION

SCT Banner Human Resources
Biographic/Demographic Information
Training Workbook

May 2005
Release 7.1

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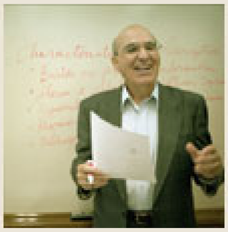


Section A: Introduction

Lesson: Overview

Jump to TOC

Workbook goal

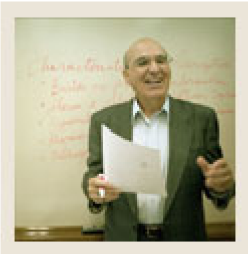
The goal of this workbook is to provide you with the knowledge and practice to accurately define persons and employees into the SCT Banner system at your institution. The workbook is divided into three sections:

- Introduction
- Set Up
- Day-to-day Operations

Intended audience

Human Resources administrators and staff who are responsible for setting up Human Resources Rule and Validation forms in the SCT Banner System and/or those who are responsible for adding new employees to the SCT Banner system.

Section contents



Section A: Introduction

Lesson: Process Introduction

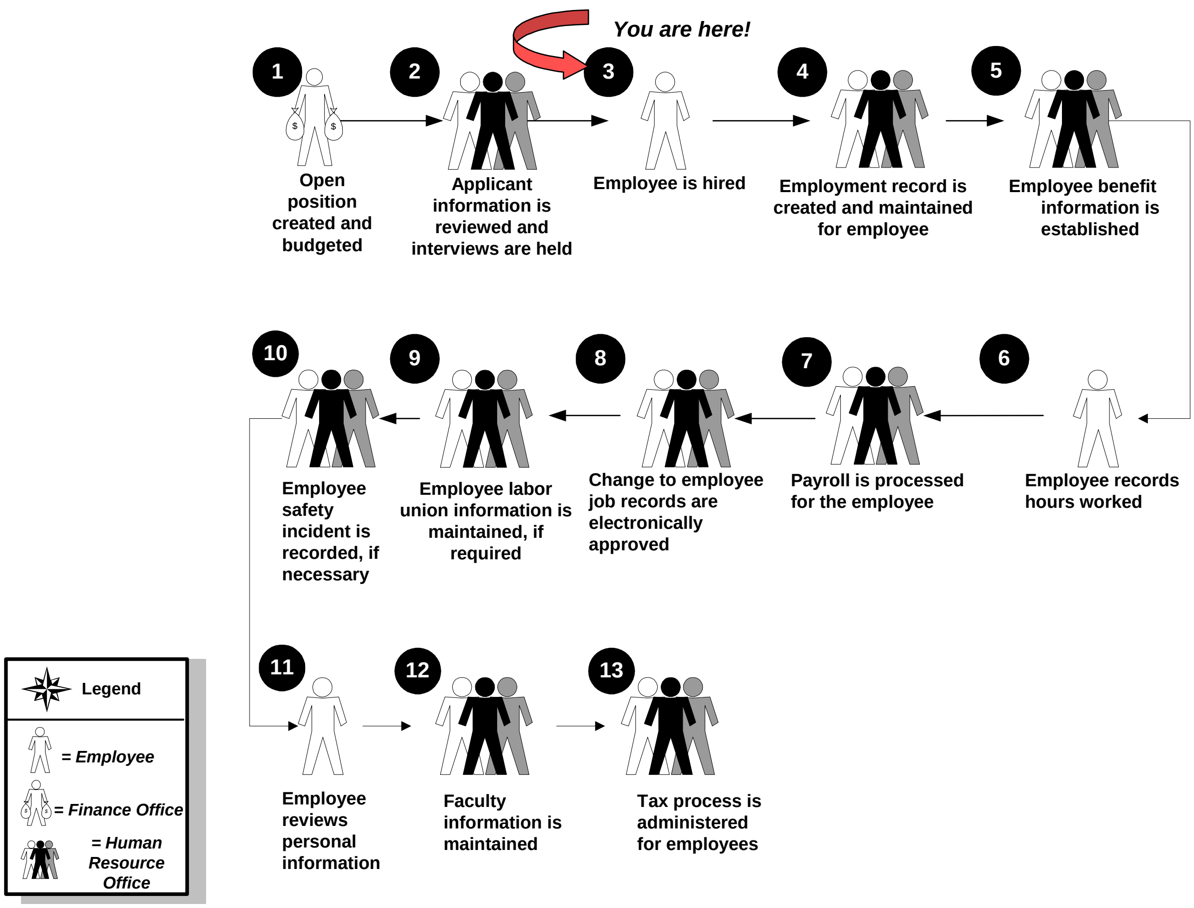
Jump to TOC

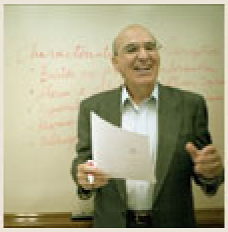
Introduction

The SCT Banner New Employee process uses several user-defined codes that are necessary when entering a new employee into the system. Once these codes are created, they are used throughout the SCT Banner HR system as the new employee is processed.

Flow diagram

This diagram highlights the processes used to enter an employee into the SCT Banner system within the overall Human Resource process.





Section A: Introduction

Lesson: Process Introduction (Continued)

Jump to TOC

About the process

- Rule and validation forms are set up on the SCT Banner system. Unless a new code is required, this step is only performed once.
- The new person/employee is entered into the SCT Banner system.
- SCT Banner has several ways of entering new hire information and the one method of a new hire quick set up will be discussed in this manual.
- Detail is added to the person/employee record, as necessary.

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Section B: Set Up

Lesson: Overview

Jump to TOC

Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set-up your SCT Banner system to handle new employees.

Intended audience

Human Resources administrators and staff who are responsible for setting up Human Resources Rule and Validation forms in the SCT Banner System.

Objectives

At the end of this section, you will be able to create the rules and set parameters used to process employee data.

Prerequisites

You should have

- completed the SCT Education Practices computer-based training (CBT) tutorial "Banner 7 Fundamentals," or have equivalent experience navigating in the SCT Banner System
- completed the Human Resources Overview training workbook
- administrative rights to create the rules and set the validation codes in SCT Banner.

Section contents

Section B: Set Up

Lesson: Rule and Validation Forms That Control General Person/Employee Processing

Jump to TOC

Introduction

Before SCT Banner can process an applicant, general person, or new employee in the system, there are several codes and rules that need to be set or created.

Types of rule forms needed

These forms are used to set the rules and parameters in SCT Banner for new persons in the system.

Form Description	SCT Banner Name
Rule Forms	
Certification Code	PTRCERT
Ethnic Code	PTRETHN
Exam Code	PTREXAM
Skill Code	PTRSKIL
Skill Level	PTRSKLV
Validation Forms	
Chart of Accounts Code	FTVCOAS
Organization Code	FTVORGN
E-mail Address Type Code	GTVEMAL
Letter Code	GTVLETR
Name Type Code	GTVNTYP
System Indicator	GTVSYSI
Zip/Postal Code	GTVZIPC
Comment Code	PTVCMTY
EEO Ethnic Code	PTVEEOC
Endorsement Code	PTVENDS
License/Certification Status Validation	PTVLCSV
Publication Code	PTVPUBT
Address Type Code	STVATYP
Citizen Type Code	STVCITZ
County Code	STVCNTY
Degree Code	STVDEGC
Degree Level Code	STVDLEV

Forms, continued

Validation Forms	
Ethnic Codes	STVETHN
Initials Code	STVINIT
Language Code	STVLANG
Major/Minor/Concentration Code	STVMAJR
Medical Code	STVMEDI
Martial Status Code	STVMRTL
Nation Code	STVNATN
Port of Entry Code	STVPENT
Relation Code	STVRELT
Source/Background Institution Code	STVSBGI
State/Province Code	STVSTAT
Telephone Type	STVTELE
Visa Type Code	STVVTYP

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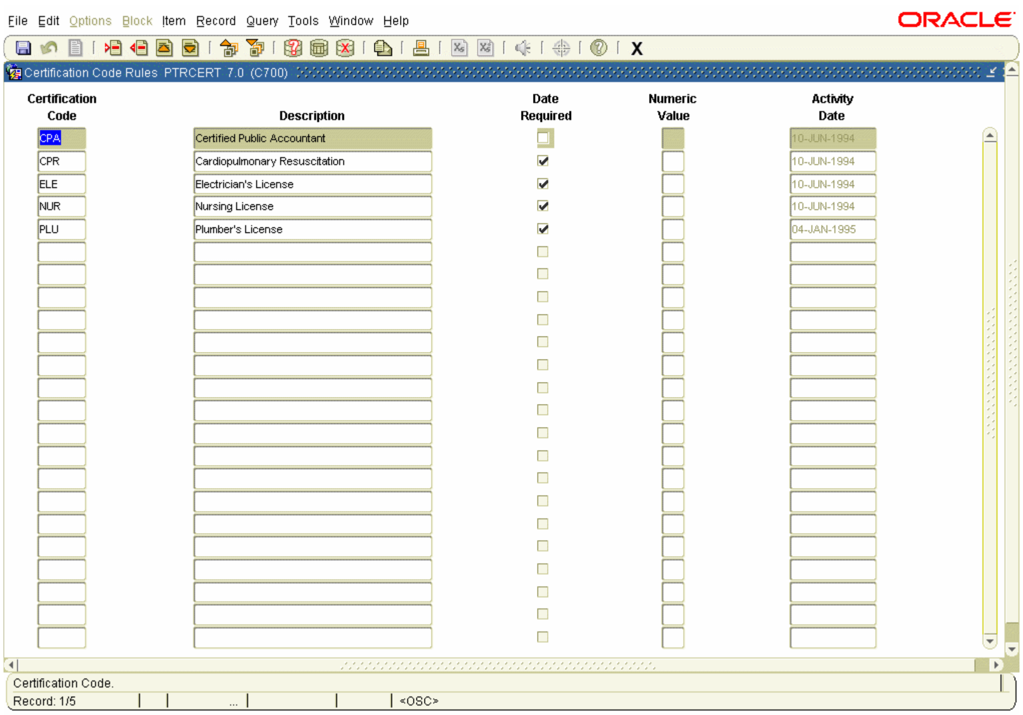
Rule form example

For our example, we'll use the Certification Code Rule Form (PTRCERT) that allows you to define codes for professional certifications.



Procedure

Follow the steps below to complete the form.

Step	Action
1	Access the Certification Code Rule Form (PTRCERT).
2	Perform an **Insert Record** function.
3	Enter a certification code (up to four characters) in the **Certification Code** field.
4	Enter a description of the certification in the **Description** field.
5	Click the **Date Required** checkbox.
6	Enter the minimum score required in the **Numeric Value** field, if required.
7	Click the **Save** icon.
8	Click the **Exit** icon.

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Section B: Set Up

Lesson: Entering Data into a Rule Form (Continued)

Jump to TOC

Introduction

The Human Resources System works in conjunction with other SCT Banner systems. Certain processes in SCT Banner Human Resources are associated with specific values in validation forms. If the forms do not contain these values, processes associated with these forms will not run correctly. You can tailor some of the forms by adding or deleting values, but certain forms must remain as delivered.

Validation forms enable you to tailor the Human Resources System to your needs by providing the system with lists of coded values that can be entered at specific prompts.

<u>Note</u>: When tailoring these codes, be mindful of the impact on other modules, i.e. Student or Alumni. Refer to your institution's data standards policy and procedures as well to ensure compliance.

Example

For example, the Major/Minor/Concentration Code Form (STVMAJR) allows you to enter the employee/student/person's major subjects at your institution or another that they attended. When a value is entered in any **Major/Minor/Concentration** field, the system checks the validation form, verifies the code, and issues an error message, if necessary.

Shared validation forms

Some of the validation forms that need to be set-up will be tables that are maintained by other areas of SCT Banner. Validation forms beginning with STV are shared with the SCT Banner Student System. Those beginning with GTV are SCT Banner General System forms. Some of these forms can be viewed but not changed without proper security access.

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Section B: Set Up

Lesson: Entering Data into a Rule Form (Continued)

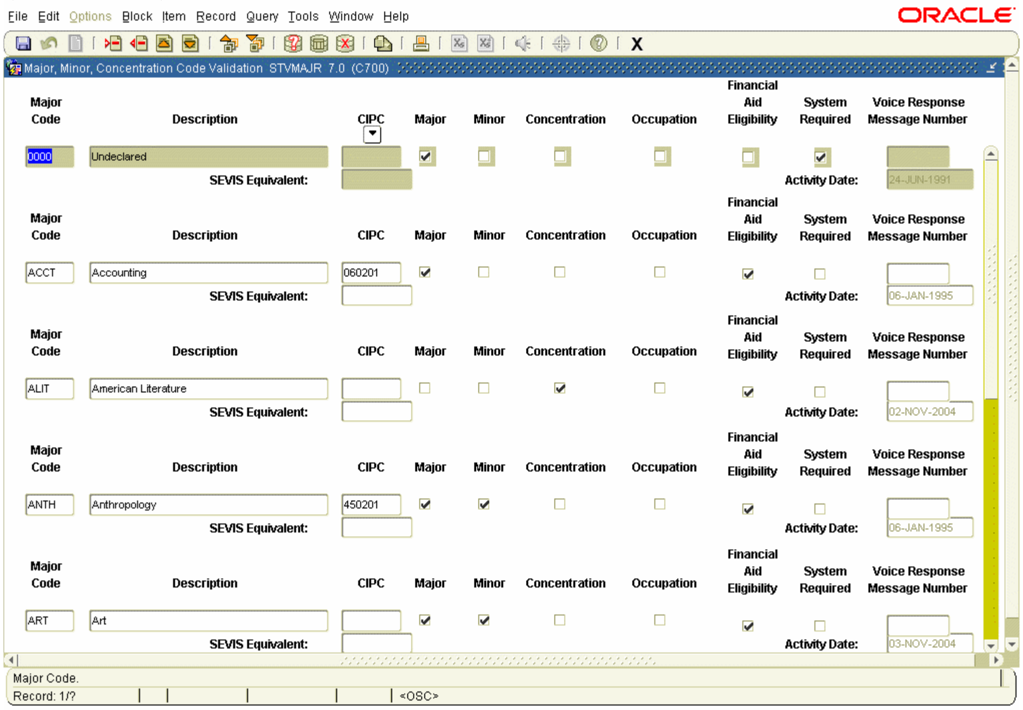
Jump to TOC

Access and review

For each validation table listed on the previous pages, access the table and review the information that is presented within the table. There will be instances that the information will need to be tailored to meet the needs of your institution. When this happens, the table can be edited to meet the needs.

SCT Banner Form

The following example uses the Major/Minor/Concentration Code Validation Form (STVMAJR).


File Edit Options Block Item Record Query Tools Window Help ORACLE

Major, Minor, Concentration Code Validation STVMAJR 7.0 (C700)

Major Code	Description	CIPC	Major	Minor	Concentration	Occupation	Financial Aid Eligibility	System Required	Voice Response Message Number	Activity Date	SEVIS Equivalent
0000	Undeclared		✔	☐	☐	☐	☐	✔		24-JUN-1991	
ACCT	Accounting	060201	✔	☐	☐	☐	✔	☐		06-JAN-1995	
ALIT	American Literature		☐	☐	✔	☐	✔	☐		02-NOV-2004	
ANTH	Anthropology	450201	✔	✔	☐	☐	✔	☐		06-JAN-1995	
ART	Art		✔	✔	☐	☐	✔	☐		03-NOV-2004	

Major Code.
Record: 1/? <OSC>

Section B: Set Up

Lesson: Entering Data into a Rule Form (Continued)

Jump to TOC

Procedure

Follow these steps to enter data into a validation form.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the form by entering STVMAJR in the Go To… field. Then press enter.</td></tr>
<tr><td>2</td><td>Verify that the information on the form is accurate for your institution.</td></tr>
<tr><td>3</td><td>Edit the table (if necessary)
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>You have access to the table</td><td>Add/delete information using the add/delete functions.
</td></tr>
<tr><td>You do not have access to the table</td><td>Contact the person who maintains the table to ask them to add the information that you will need.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click the Save icon.</td></tr>
<tr><td>5</td><td>Click the Exit icon.</td></tr>
</table>

Section B: Set Up

Lesson: Self Check

Jump to TOC

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

Rule codes are updated immediately after they are added or changed.

True or False

Question 2

Only management has access to Rule and Validation forms.

True or False

Section B: Set Up

Lesson: Answer Key

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Question 1

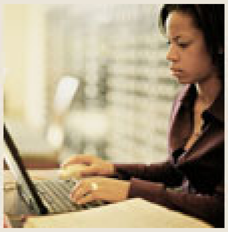
Rule codes are updated immediately after they are added or changed.

True or False

Question 2

Only management has access to Rule and Validation forms.

False. It depends on responsibilities.



Section C: Day-to-Day Operations

Lesson: Overview

Jump to TOC

Introduction

The purpose of this section is to explain the procedures in adding a new employee to the SCT Banner system.

Intended audience

Human Resources staff who are responsible for adding new employees to the SCT Banner system.

Objectives

At the end of this section, you will be able to

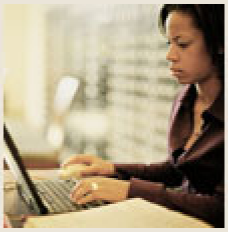
- generate a new person record for an employee
- add detail information to an employee record
- add a new employee to the system using the Quick New-Hire Set Up procedure.

Prerequisites

You should have

- completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner System
- completed the Human Resources Overview workbook.

You will also need to ensure that the rules and validation codes in SCT Banner needed for employee processing have been set up for you.



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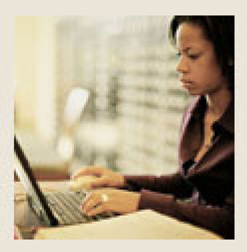


Section C: Day-to-Day Operations

Lesson: Process Introduction

Jump to TOC

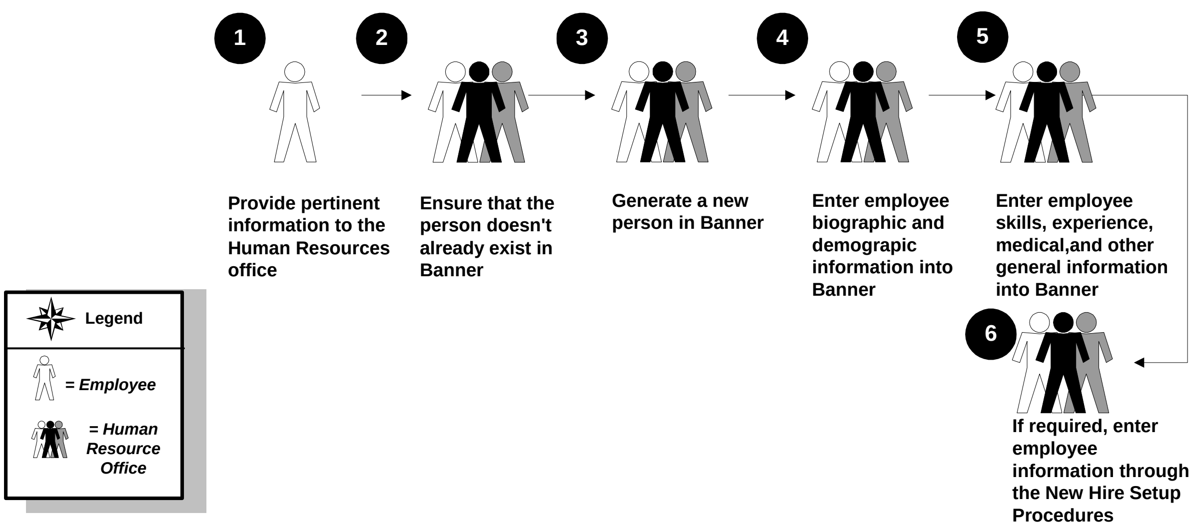
About the process

The Human Resource Office can:

- create a record for a person or non-person who has never been identified to the system.
- add or update biographic/demographic information about a person or non-person who was previously defined in SCT Banner.

Flow diagram

This diagram highlights the processes used to enter a new employee into the SCT Banner HR system.



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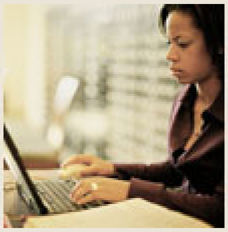
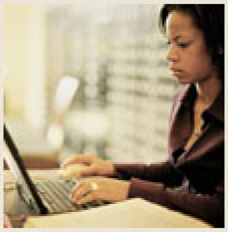


Jump to TOC

What happens

The stages of the process are described in this table.

Stage	Description
Human Resources office	
1	Employee provides pertinent information to the **Human Resources** office.
2	The **Human Resources** office ensures that the person doesn't already exist in SCT Banner.
3	Generate a new person in SCT Banner.
4	Enter employee biographic and demographic information.
5	Enter employee skills, experience, medical, and other general information into SCT Banner.
6	If required, enter employee information through the New Hire Set Up Procedures.



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Terminology

When a person is entered into the SCT Banner system, an ID (Identification Number) is generated. There are two types of ID's generated.

- **Person** – employee or non-employee who has a personal relationship to the institution (COBRA beneficiary).
- **Non-Person** – someone who does not have a personal relationship with the institution, such as a vendor. It is often used to enter corporations and/or companies for Events Management and SCT Banner Finance. Employee and other records (Beneficiary) used in SCT Banner Human Resources cannot be entered as non-persons.

When an employee is entered, a social security number must be entered into the SSN/SIN/TFN field. The following table further defines the SSN/SIN/TFN field.

Code	Definition	Where Used
SSN	Social Security Number	United State of America
SIN	Social Insurance Number	Canada
TFN	Fax Filing Number	Mexico

Standards

We recommend that your institution develop data standards for defining how names, titles, and IDs should be entered. For example, you must determine if all names will have a prefix (Ms. /Miss/Mrs. /Mr.) or will they be entered simply as first and last names. If your institution routinely uses Social Security Numbers as Identification, and you do not know the Social Security Number of a non-employee, your institution should devise a data standard for the ID number.

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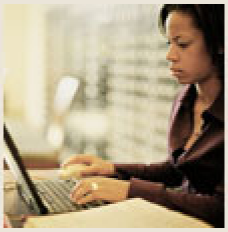


Section C: Day-to-Day Operations

Lesson: Generating a New Person Record for an Employee

Jump to TOC

Introduction

The Identification Form (PPAIDEN) provides an entry into the SCT Banner system. It generates a unique ID number for each individual. The ID number and name are the minimum requirements to **Save** the record on the system.
The name entered on PPAIDEN appears on all paychecks and regulatory forms issued for an employee.

The Identification Form shares data with all SCT Banner forms, and can be updated.

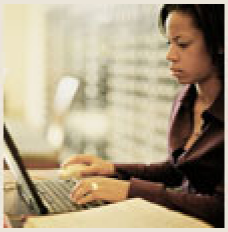
In PPAIDEN, when you add a new person to the system, you can also add biographic/demographic data. The new person does not show up on the employee search form POIIDEN until you have completed the Employee Form PEAEMPL. However, the name of the person will appear on the Person Search Form SOAIDEN.

Required fields

The following fields are required in PPAIDEN when a person is being defined as an employee:

- birth date
- first name
- last name
- SSN/SIN/TIN
- address
- gender.

Note: Some fields on PPAIDEN are optional, and sometimes entire windows are optional.

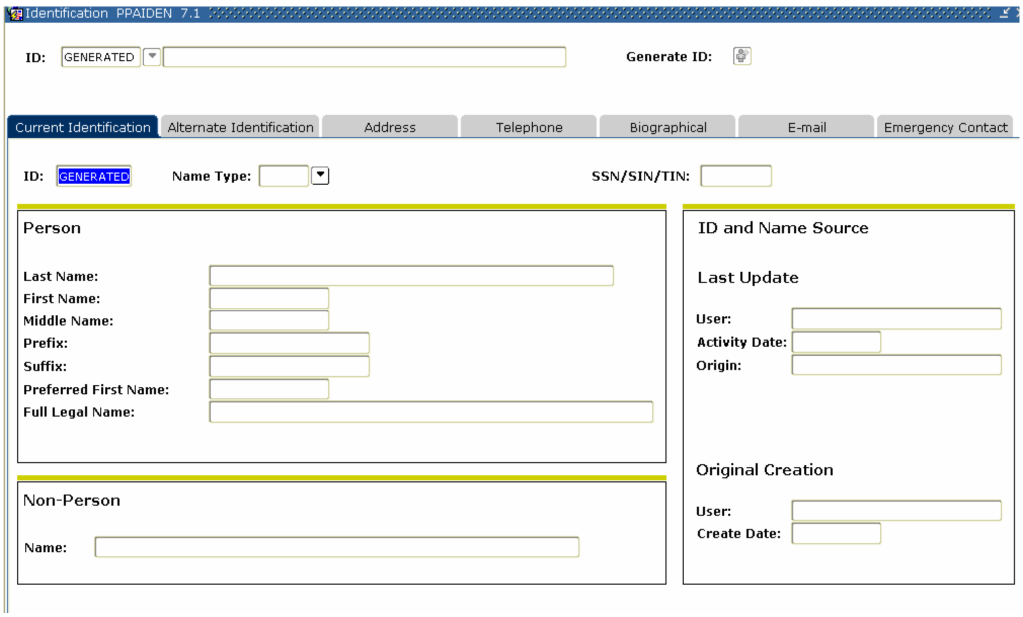


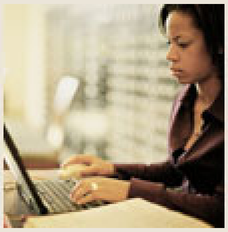
Section C: Day-to-Day Operations

Lesson: Generating a New Person Record for an Employee (Continued)

Jump to TOC

SCT Banner form





Section C: Day-to-Day Operations

Lesson: Generating a New Person Record for an Employee (Continued)

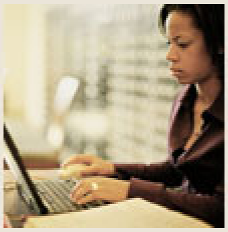
Jump to TOC

Procedure

Follow these steps to generate a new person record for an employee.

Note: Before you begin, choose a name for the new person you will enter into the system. You may want to perform a search to ensure that the person you are entering is not already in the system.

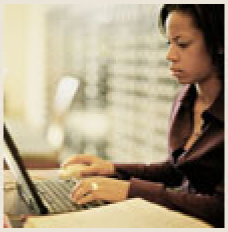
Step	Action
1	Access the Identification Form (PPAIDEN).
2	Click the **Generate** icon. Note: When you click the **Generate ID** icon, the word "Generated" defaults to the **ID** field. This does not change until the record is saved.
3	Click the **Next Block** icon.
4	Enter the employee's social security number in the **SSN/SIN/TIN** field.
5	Enter the person's last name in the **Last Name** field. Note: As per the institution's data standards, enter the Last Name *exactly* as it appears on the Social Security Card for payroll purposes.
6	Enter the person's first name in the **First Name** field.
7	Optional - enter the person's middle name in the **Middle Name** field.
8	Optional - enter a prefix (Ms., Mrs., Miss, Mr., Dr., Rev., Admr.) in the **Prefix** field.
9	Optional - enter a suffix (M.D., Jr.) in the **Suffix** field.
10	Optional – enter the person's preferred first name in the **Preferred First Name** field. Note: The **Preferred First Name** field does not print or display or any other form or report but can be built into reports through customizations.
11	Optional – enter the person's full legal name in the **Full Legal Name** field.
12	Click the **Save** icon.
13	Click the **Biographical** tab.



Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>Enter the employee’s date of birth in the Birth Date fields.

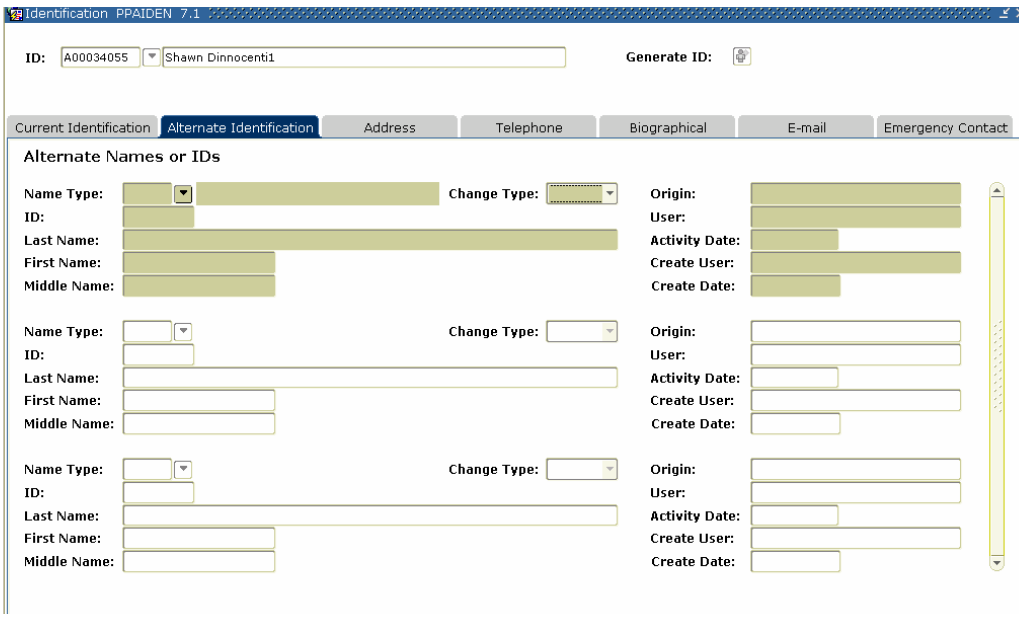
<u>Warning:</u> The fields appear in Day/Month/Year order. Be careful to enter the day prior to the month.</td></tr>
<tr><td>15</td><td>Select the employee’s gender in the Gender field.</td></tr>
<tr><td>16</td><td>Click the Save icon.</td></tr>
<tr><td>17</td><td>Complete the process
<table>
<tr><th>IF you want to…</th><th>THEN…</th></tr>
<tr><td>Review the new record and add more information</td><td>Select the desired tab.</td></tr>
<tr><td>Add another new employee</td><td>Click the Generate ID icon.</td></tr>
<tr><td>Assign a job to this new employee</td><td>Exit this form and access the New Hire Form (PEAHIRE). See section C for details.</td></tr>
<tr><td>Exit this form.</td><td>Click the Close X icon.</td></tr>
</table>
</td></tr>
</table>



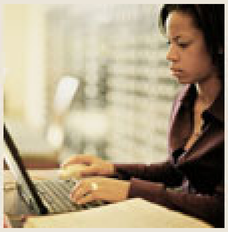
Introduction

The Alternate Identification tab is used to enter a current, previous or alternate name for a person. This is helpful when you need to record name changes associated with marriages or divorces.

SCT Banner form



Note: You can enter multiple alternative identifications for a person but you cannot delete an alternative identification once it is saved in SCT Banner.



Section C: Day-to-Day Operations

Lesson: Entering Alternate Identification Information (Continued)

Jump to TOC

Procedure

Follow the steps below to enter alternate identification information.

Step	Action
1	Access the **Alternate Identification** tab.
2	Select the name type code from the **Name Type** drop-down list.
3	Select the change type code from the **Change Type** drop-down list.
4	Enter an alternate name for the person, such as a maiden name, in the **Last Name** field.
5	Enter the person's first name in the **First Name** field.
6	Optional - enter the person's middle name in the **Middle Name** field.
7	Click the **Save** icon. Note: When an employee changes his/her name on PPAIDEN, the alternate name field will be populated automatically in SCT Banner.
8	Select another tab to continue adding information or Click the **Exit** icon.

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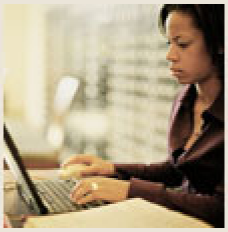


Section C: Day-to-Day Operations

Lesson: Entering Address Information

Jump to TOC

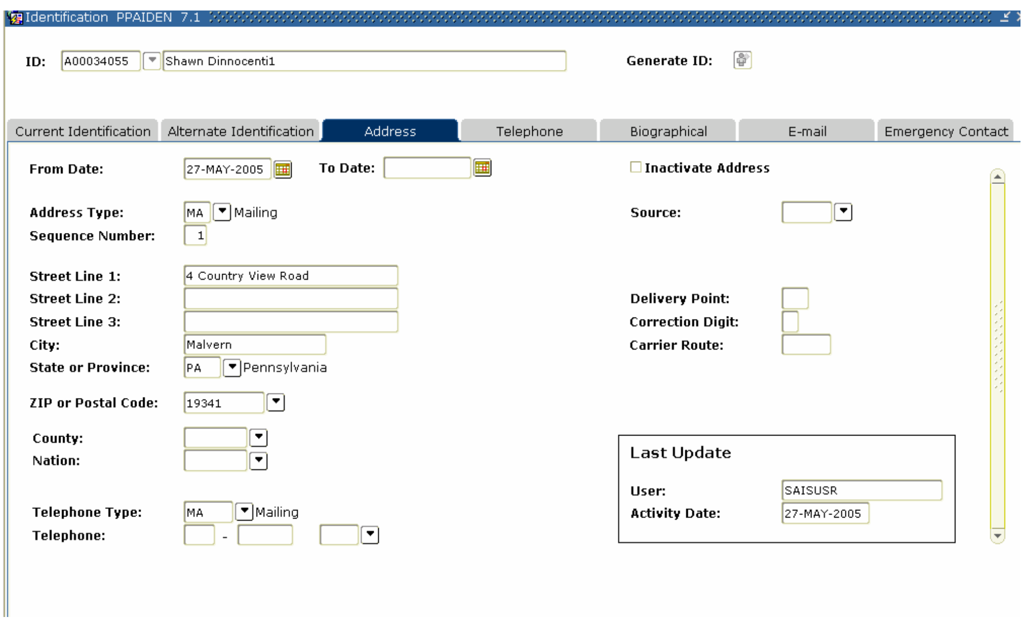
Introduction

The Address tab allows you to enter or update an address. You can add details such as delivery points or carrier routes. Addresses are required for employees.

This window is optional for non-employee records such as Trustees or COBRA person beneficiaries. Some persons may have more than one address, such as a Mailing address and a Business address. These are referred to as Address Types. It is important that each address be entered with the appropriate Address Type. You can add multiple addresses or see an address history by clicking the **Address Type** list and selecting **Addresses (PPIADDR)**.

<u>Note</u>: When checks are processed, the Address Type is a requirement of the payroll system. Be sure to use the same Address Type in PPAIDEN, as used by HR Payroll. For example, if the Address Type entered in PPAIDEN is CA (Campus Address) and the payroll address type is MA (Mailing Address), when payroll is processed, the system will not be able to identify an address for the paycheck.

SCT Banner form



Identification PPAIDEN 7.1

ID: A00034055 Shawn Dinnocenti1 Generate ID:

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact

From Date: 27-MAY-2005 To Date: Inactivate Address

Address Type: MA Mailing Source:

Sequence Number: 1

Street Line 1: 4 Country View Road

Street Line 2: Delivery Point:

Street Line 3: Correction Digit:

City: Malvern Carrier Route:

State or Province: PA Pennsylvania

ZIP or Postal Code: 19341

County:

Nation:

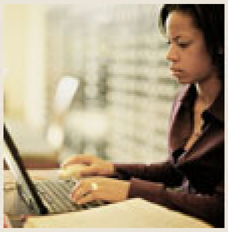
Last Update

User: SAISUSR

Activity Date: 27-MAY-2005

Telephone Type: MA Mailing

Telephone: -



Section C: Day-to-Day Operations

Lesson: Entering Address Information (Continued)

Jump to TOC

Procedure

Follow the steps below to update address information.

Step	Action
1	Access the **Address** tab.
2	Optional – enter dates in the **From** and **To** fields indicating when the person started living at that address. The **From** field defaults to the current day.
3	If the address is no longer active, select the **Inactive** field.
4	Double-click in the **Address Type** field and select the code identifying the type of address. Note: SCT Banner defaults to the home address.
5	Enter the employee's address in the **Address** field. Note: Address Line 1 is required.
6	Enter the city associated with the address in the **City** field.
7	Double-click the **State or Province** field and select the state or province code.
8	Enter the zip code in the **ZIP or Postal Code** field. Note: You may also double-click the **ZIP or Postal Code** field and select the zip/postal code associated with the address. A search function is available.
9	Optional – double-click the **County** field and select and return the county associated with the address.
10	Optional- Enter "157" in the **Nation** field for the United States of America. Note: You can also double-click the **Nation** field and select the country code associated with the address. This is only required if the State/Province field is not complete.
11	Click the **Save** icon.
12	Select another tab to continue adding information or Click the **Exit** icon.

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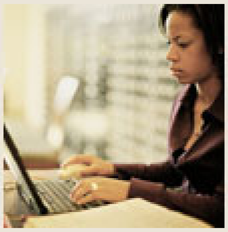


Section C: Day-to-Day Operations

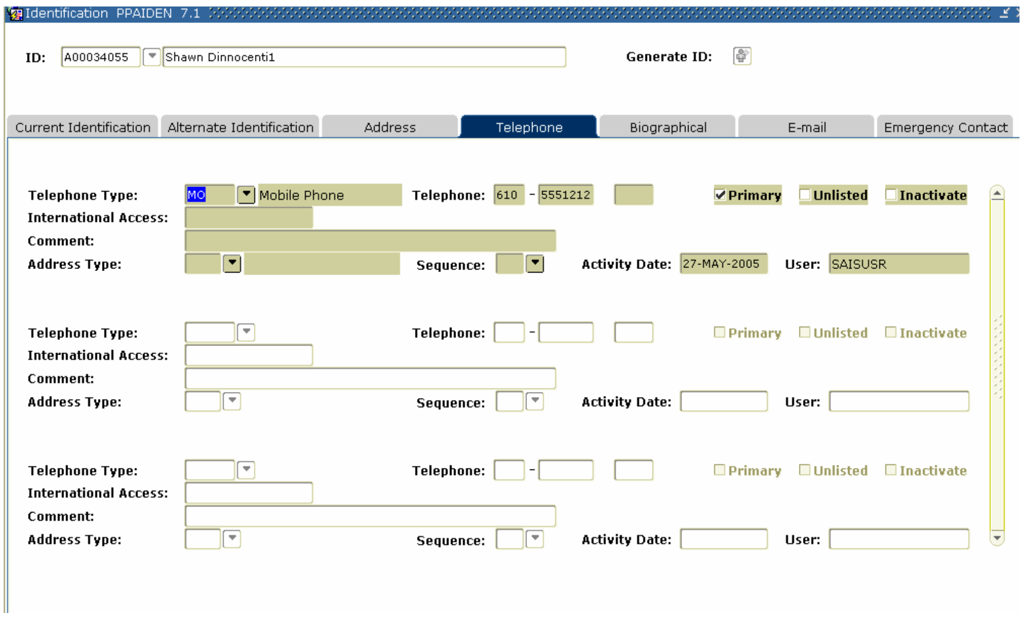
Lesson: Entering Telephone Information

Jump to TOC

Introduction

The Telephone tab allows you to add details regarding a person's phone number and add comments. It automatically records the activity date when you save the record.

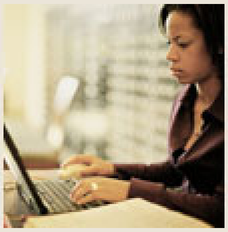
SCT Banner form



Procedure

Follow the steps below to enter current identification information.

Step	Action
1	Access the Telephone tab.
2	Double-click the **Telephone Type** field and select a telephone type.
3	Enter the employee's phone number in the **Telephone** field.
4	Click the **Primary** checkbox if this is the person's primary phone number.
5	Click the **Save** icon.
6	Select another tab to continue adding information or Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Entering Biographical Information

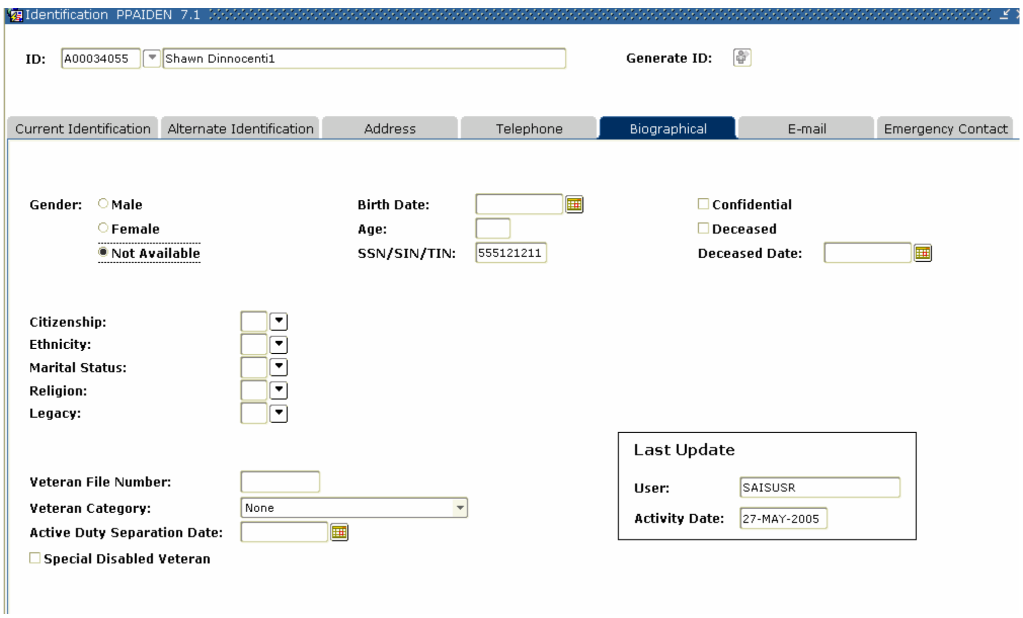
Jump to TOC

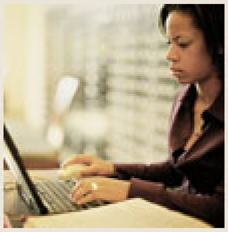
Introduction

The Biographical tab on the Identification Form (PPAIDEN) is used to enter biographic and demographic information for a person/employee.
Many of the fields such as, Date of Birth, Gender, and Citizenship are required for IPEDS reporting.

Note: You can select the **Confidential** option to mark this information as confidential. This tab is also to record an employee's death.

SCT Banner form





Section C: Day-to-Day Operations

Lesson: Entering Biographical Information (Continued)

Jump to TOC

Procedure

Follow these steps to add biographical information.

Step	Action
1	Access the **Biographical** tab.
2	Click the **Confidential** checkbox to mark this information as confidential. <u>Note:</u> The **Confidentiality Indicator** field is for reporting purposes only. If it is checked, it is displayed on the Letter Generation window. It has no effect on Web for Employees data.
3	Do not check the **Deceased** field. <u>Note</u>: If the employee is deceased, the Date field should also be entered with the date of death. The employee's age at the time of death is calculated by the system. This field populates the Deceased box on the W2 report.
4	Add or edit the gender, birth date, and SSN/SIN/TIN information, if needed. The person's age will be automatically calculated. <u>Notes:</u> If you have already entered this information when you generated a new person record in PPAIDEN, the information will appear on this tab. You can edit this information here. The gender of an employee cannot be *Unavailable*.
5	Double-click the **Citizenship** field and select a Citizen Type code. <u>Note:</u> We suggest setting up codes in STVCITZ for *Citizen*, *Resident Alien*, and *Non-Resident Alien*.
6	Double-click the **Ethnicity** field and select an Ethnic Code.
7	Optional – double-click the **Marital Status** field and select a Marital Status code.
8	Optional – double-click the **Religion** field and select a Religion code.
9	Optional – double-click the **Legacy** field and select a Legacy code. <u>Note</u>: This code is normally used for Alumni purposes; however, Human Resources could use it to identify any relatives working at the institution.

Jump to TOC

Procedure, continued

Step	Action
10	Enter the file number in the **Veteran File Number** field, if the person is a veteran.
11	Double-click the **Veteran Category** field and select a valid code if the person is a veteran,.
12	Check the **Special Disabled Veteran** field if the person is a veteran and disabled. Note: A special disabled veteran is either of the following: 1) A veteran who is entitled to compensation (or who would be but for the receipt of military retired pay) under laws administered by the Department of Veteran Affairs for a disability (i) rated at 30% or more, or (ii) rated at 10 or 20% in the case of a veteran who has been determined under Section 1506 of Title 38, who has been determined under Section 1506 of Title 38, U.S, to have a serious employment handicap. 2) A veteran who was discharged or released from active duty because of a service-connected disability.
13	Enter the date on which the individual separated or was discharged from active military duty in the **Active Duty Separation Date** field. Note: This date is used to classify veterans under the *newly separated veterans' category* on the VETs-100 reports whose active duty separation date falls within the VETS reporting period.
14	Click the **Save** icon.
15	Select another tab to continue adding information or Click the **Exit** icon.

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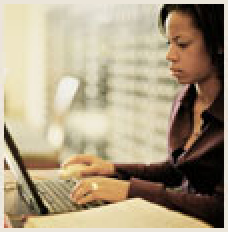


Section C: Day-to-Day Operations

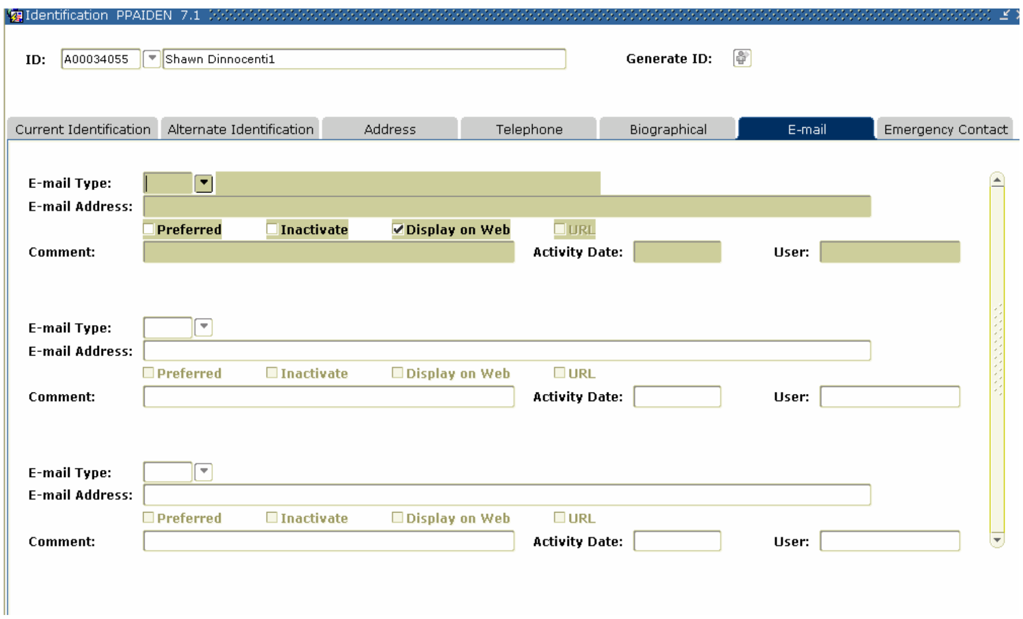
Lesson: Entering E-mail Information

Jump to TOC

Introduction

The E-mail tab allows you to add details regarding a person's e-mail information and add comments. It automatically records the activity date when you save the record.

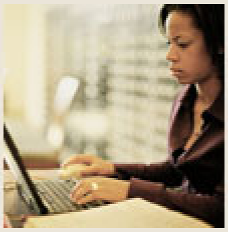
SCT Banner form



Procedure

Follow the steps below to enter e-mail information.

Step	Action
1	Click the **E-mail** tab.
2	Select an E-mail type in the **E-mail Type** field.
3	Enter the employee's e-mail address in the **E-mail address** field.
4	Click the **Preferred** checkbox if this is the person's preferred e-mail address.
5	Click the **Save** icon.
6	Select another tab to continue adding information or Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Entering Emergency Contact Information

Jump to TOC

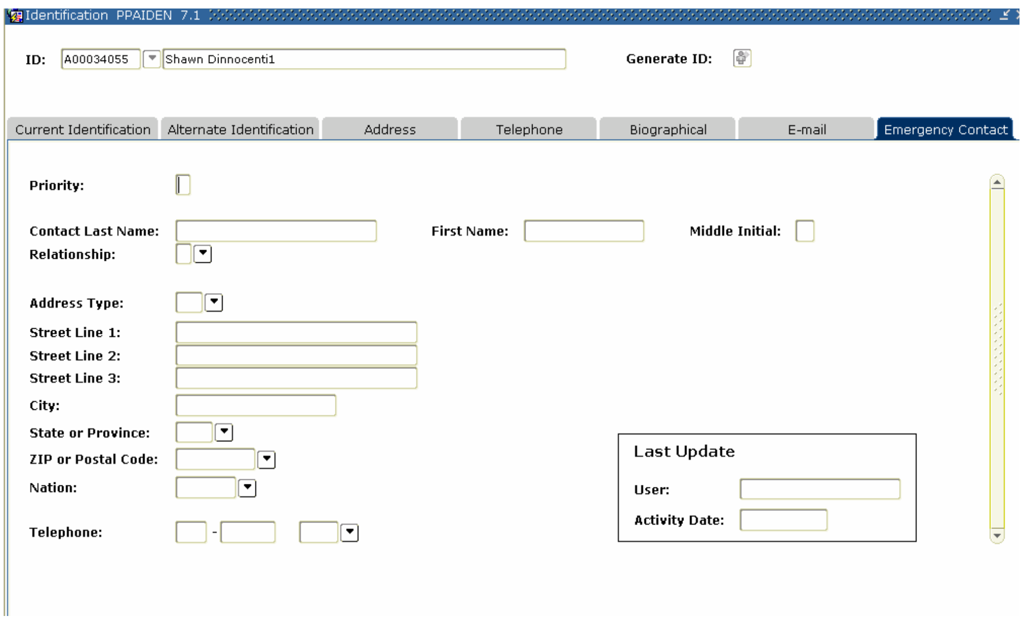
Introduction

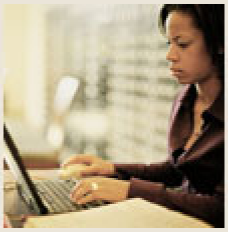
The Emergency Contact tab on the Identification Form (PPAIDEN) is used to enter Emergency Contact Information for a person/employee.

The Emergency Contact information is optional. If you do choose to maintain this information, the Name and Priority fields are required. The Emergency Contact list may be prioritized according to the order in which the contacts should be notified of an emergency.

Emergency Contact information can be accessed from the Web if allowed by your institution.

SCT Banner form





Section C: Day-to-Day Operations

Lesson: Entering Emergency Contact Information (Continued)

Jump to TOC

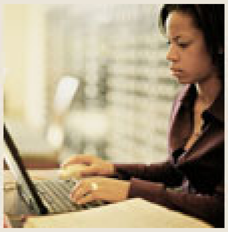
Procedure

Follow these steps to enter emergency contact information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Emergency Contact tab.</td></tr>
<tr><td>2</td><td>Enter a number in the Priority field to specify the order of contact priority.

<u>Note:</u> Even if you only have one emergency contact, you must enter a “1”. When adding others, add the change with the next available priority number, save, then go back and renumber without saving until you have changed all that is needed.</td></tr>
<tr><td>3</td><td>Enter the contact person’s last name in the Contact Last Name field.</td></tr>
<tr><td>4</td><td>Enter the contact person’s first name in the First field.</td></tr>
<tr><td>5</td><td>Optional - enter the contact person’s middle initial in the MI field.</td></tr>
<tr><td>6</td><td>Double-click the Relationship field and select and return a Relationship code.</td></tr>
<tr><td>7</td><td>Select the Search button at the Address Type field and return EM (Emergency Contact) from the Address Type Validation form.</td></tr>
<tr><td>8</td><td>Enter the contact person’s address in the Address field. Enter at least one address.</td></tr>
<tr><td>9</td><td>Enter the contact person’s city in the City field.</td></tr>
<tr><td>10</td><td>Double-click the State/Province field and select and return a State/Province code.</td></tr>
<tr><td>11</td><td>Enter the contact person’s zip code in the ZIP/Postal Code field.</td></tr>
<tr><td>12</td><td>Optional- Enter “157” in the Nation field for the United States of America.

<u>Note</u>: You can also double-click the Nation field and select a Nation code.</td></tr>
<tr><td>13</td><td>Enter the contact person’s phone number in the Phone field.</td></tr>
<tr><td>14</td><td>Click the Save icon.</td></tr>
<tr><td>15</td><td>Complete the process
<table>
<tr><th>IF you want to…</th><th>THEN…</th></tr>
<tr><td>Review the new record and add more information</td><td>Select the desired tab.</td></tr>
<tr><td>Add another new employee</td><td>Click the Generate ID icon.</td></tr>
<tr><td>Assign a job to this new employee</td><td>Exit this form and access the New Hire Form (PEAHIRE). See section C for details.</td></tr>
<tr><td>Exit this form.</td><td>Click the Close X icon.</td></tr>
</table></td></tr>
</table>



Section C: Day-to-Day Operations

Lesson: Entering General Information

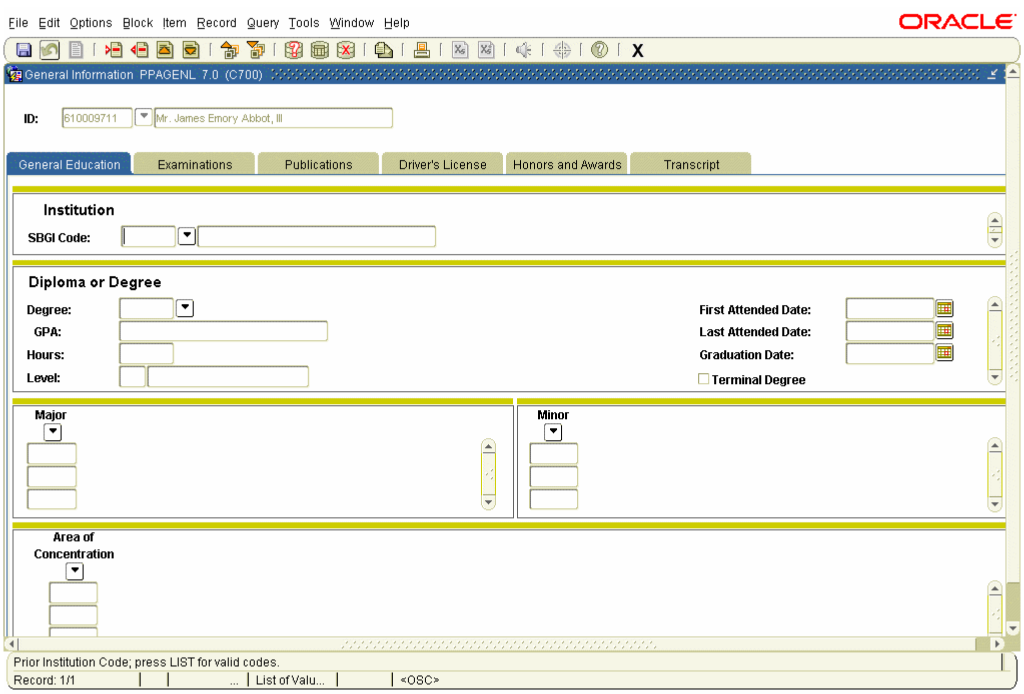
Jump to TOC

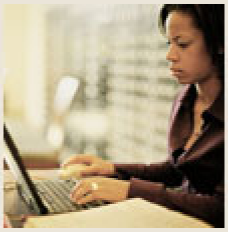
Introduction

The General Information Form (PPAGENL) captures person or employee general qualifications normally submitted by an applicant, including education, experience, examination results, and publications. You can easily access this form using the **Options** menu on the Person Identification form.

<u>Note:</u> PPAGENL is closely affiliated with Applicant Tracking and matching applicants to position vacancies through the Process Submission Control form (PARMAPP). You can track official transcripts on this form, which is a shared function of the Student System via Faculty Degree Information Form, SIAFDEG. The assignment of this responsibility should be decided during implementation.

SCT Banner form





Jump to TOC

Procedure

Follow these steps to enter general information.

Step	Action
1	Access the General Information Form (PPAGENL).
2	Enter your person's ID in the **ID** field or perform a **Search**.
3	Perform a **Next Block** function.
4	Select the **Search** function in the **SBGI Code** field and select the person's Institution. Note: The SBGI code is user-defined and enables you to identify educational institutions.
5	Click the **Save** icon.
6	Perform a **Next Block** function.
7	Double-click the **Code** field and select and return a Degree Code.
8	Enter the person's Grade Point Average in the **GPA** field.
9	If necessary, enter the number of hours in the **Hours** field.
10	Enter the dates that the person attended the institution in the **Dates of Attendance** fields.
11	Enter the person's graduation date in the **Date of Graduation** field.
12	Click the **Terminal Degree** checkbox. Note: When you check the Terminal Degree field, this information will display in Faculty Tracking (PEAFACT).
13	Use the down arrow to enter more degree information if this employee has multiple degrees with this institution.
14	Click the **Save** icon.
15	Perform a **Next Block** function.
16	Double-click the **Major** field and select and return a Major, Minor, Concentration code.
17	Double-click the **Minor** field and select and return a Major, Minor, Concentration code.
18	Double-click the **Concentration** field and select and return a Major, Minor, Concentration code.
19	Click the **Save** icon.

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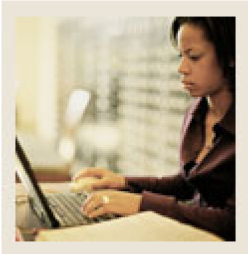
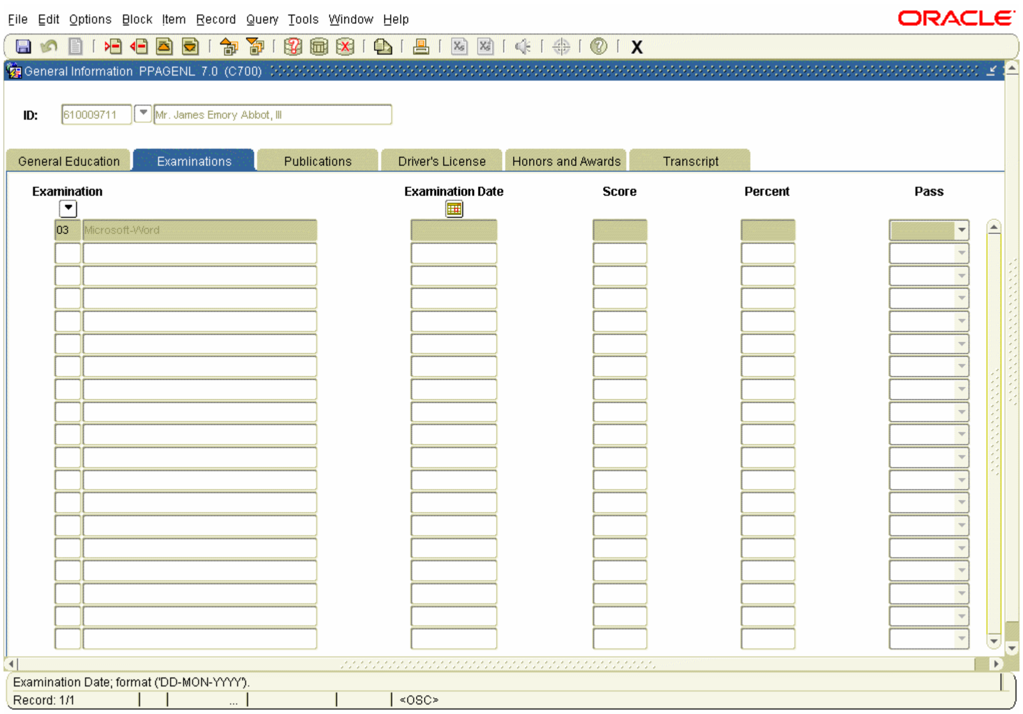


Jump to TOC

Examinations tab

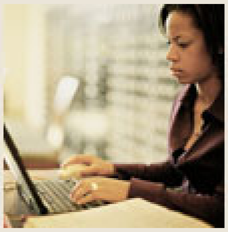
The Examinations Option is used to capture information about formal exams for minimum qualifications such as a CPA, State Bar, Medical licenses, and any other professional certification or licensing exams. It may also be used for an institution's internal exams. The examination codes are entered on the Exam Code Rules Form (PTREXAM).



Procedure

Follow these steps to enter examination information.

Step	Action
1	Select the **Examination** tab.
2	Select the **Search** function in the **Examination Code** field and select a valid Examination code.
3	Enter the date of the exam in the **Exam Date** field.
4	Enter the test score in the **Score** field.
5	Enter the test score percentage in the **Percent** field.
6	In the **Pass?** Field, *Pass* or *Fail* is defaulted but can be overridden.
7	Click the **Save** icon.



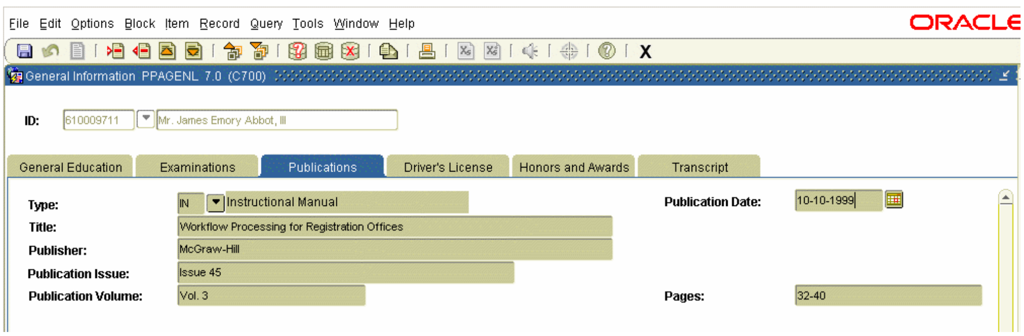
Section C: Day-to-Day Operations

Lesson: Entering General Information (Continued)

Jump to TOC

Publications tab

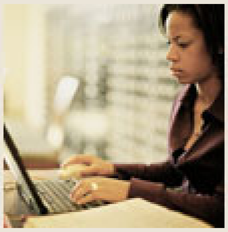
The Publication tab is used to enter faculty publications.



Procedure

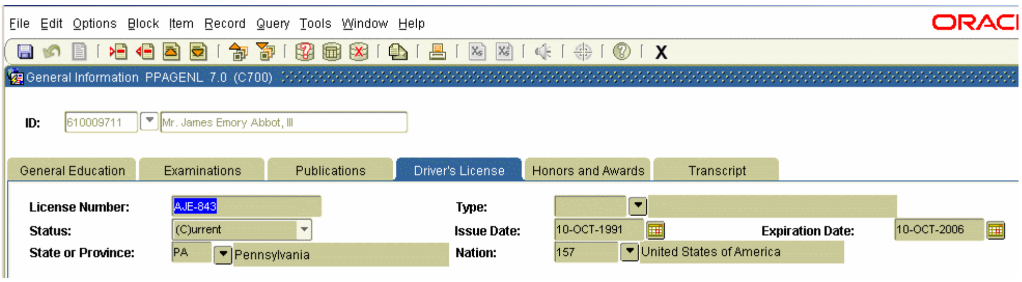
Follow these steps to enter publication information.

Step	Action
1	Select the **Publication** tab.
2	Double-click the **Type** field and select a Publication Code.
3	Enter the title of the published work in the **Title** field.
4	Enter the name of the publisher in the **Publisher** field.
5	Enter the Issue name in the **Publication Issue** field.
6	Enter the Volume name in the **Publication Volume** field.
7	Enter the pages numbers of the publication in the **Pages** field.
8	Enter the date in the **Publication Date** field.
9	Click the **Save** icon.



Jump to TOC

Driver's License tab



Procedure

Follow these steps to enter driver's license information.

Step	Action
1	Select the **Driver's License** tab.
2	Enter the Driver's License Number (up to 20 characters) in the **License Number** field.
3	Optional - double-click in the **Type** field, and select a Skill code.
4	Select a status code from the drop-down menu in the **Status** field. Note: SCT Banner defaults to C-Current but you can also select among the following status options: *E*-Expired, *S*-Suspended, *I*-In Process.
5	Enter the date the license became effective in the **Issue Date** field.
6	Enter the date the license expires in the **Expiration Date** field.
7	Double-click the **State/Province** field and select and return a State/Providence code.
8	Double-click in the **Nation** field and select and return a Nation code.
9	Click the **Save** icon.

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Jump to TOC

Honors and Awards tab

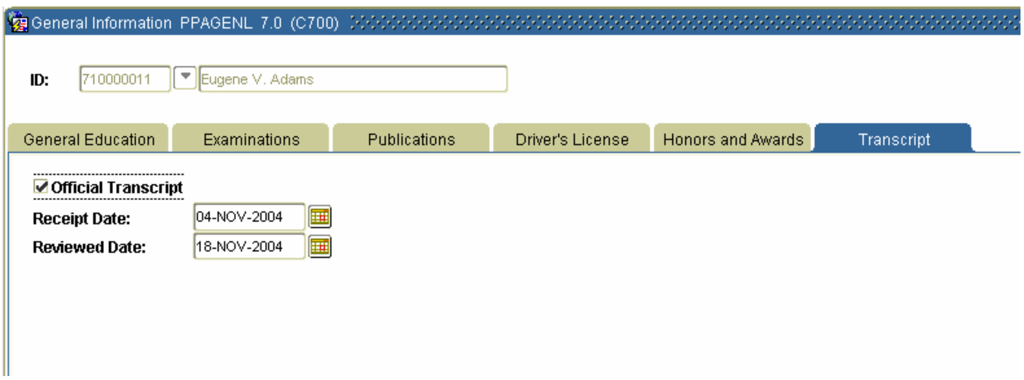
Procedure

Follow these steps to enter honor and award information.

Step	Action
1	Select the **Honors and Awards** tab.
2	Enter a title to describe the honors and award given in the **Honors/Award Title** field.
3	Enter the organization that gave the award in the **Awarding Organization** field.
4	Enter the date the award was issued in the **Date Awarded** field.
5	Optional - enter the date the award expires in the **Date Expired** field.
6	Click the **Save** icon.

Transcript tab

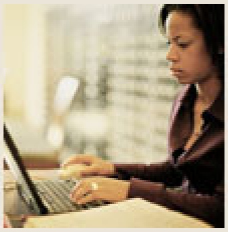
The Office of the Registrar uses the Transcript option.



Procedure

Follow these steps to enter transcript information.

Step	Action
1	Select the **Transcript** tab.
2	Click the **Official Transcript** box if this is an official transcript.
3	Enter the date that the transcript was received in the **Date of Receipt** field.
4	Enter the date that the transcript was reviewed in the **Date of Review** field.
5	Click the **Save** icon.
6	Click the **Exit** icon.



Section C: Day-to-Day Operations

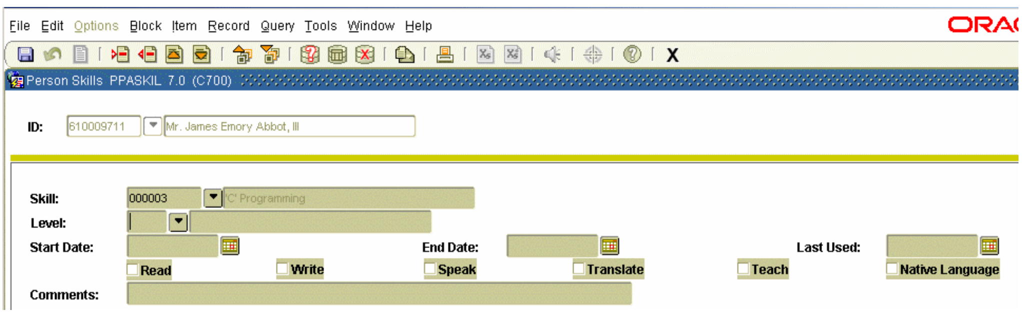
Lesson: Entering Skills Information

Jump to TOC

Introduction

The Person Skills Form (PPASKIL) maintains information about the skill and level of expertise of a specified applicant or employee. Skill information is populated on the PTRSKIL rule form and PTRSKLV rule form.

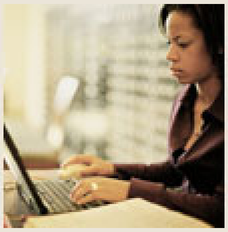
SCT Banner form



Procedure

Follow these steps to enter skill information.

Step	Action
1	Access the Person Skills Form (PPASKIL).
2	Enter your new person's ID in the **ID** field or perform a search to find the ID.
3	Perform a **Next Block** function.
4	Click the **List** icon in the **Skill** field and select a skill code.
5	Click the **List** icon in the **Level** field and select a level.
6	Enter the date that the person started this skill in the **Start Date** field.
7	Enter the date that the employee stopped using this skill in the **End Date** field.
8	Enter the date that the employee last used this skill in the **Last Used** field.
9	Click the **Read**, **Write**, **Speak**, **Translate**, **Teach**, and/or **Native Lang** check box(es) if the employee's skill is a language.
10	Enter any additional information regarding this skill in the **Comments** field.
11	Click the **Save** icon.
12	Click the **Exit** icon.



Section C: Day-to-Day Operations

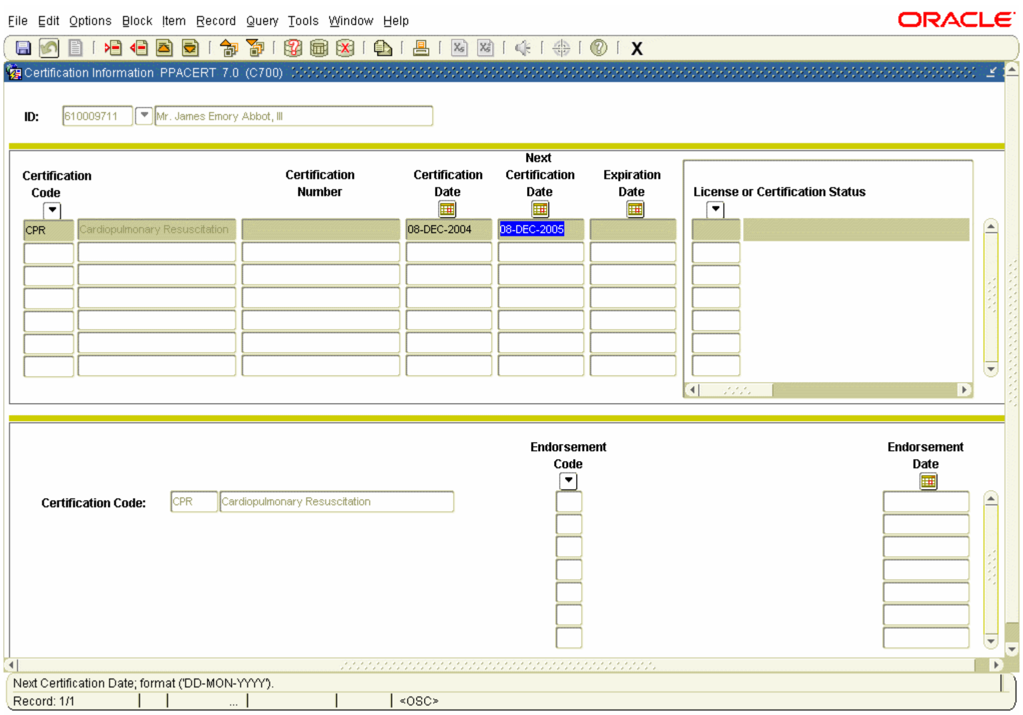
Lesson: Entering Certification Information

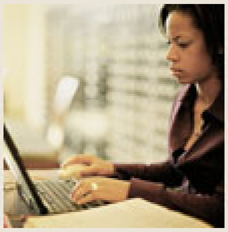
Jump to TOC

Introduction

The Certification Information Form (PPACERT) collects data on applicant/employee certifications and endorsements. The certification codes are pulled from PTRCERT. You can also use this form to track both formal certifications and completion of internal education programs. The Pending Action Report will list upcoming expirations of these certifications.

SCT Banner form





Section C: Day-to-Day Operations

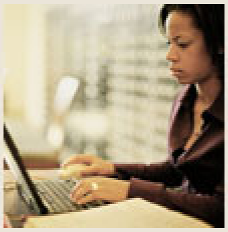
Lesson: Entering Certification Information (Continued)

Jump to TOC

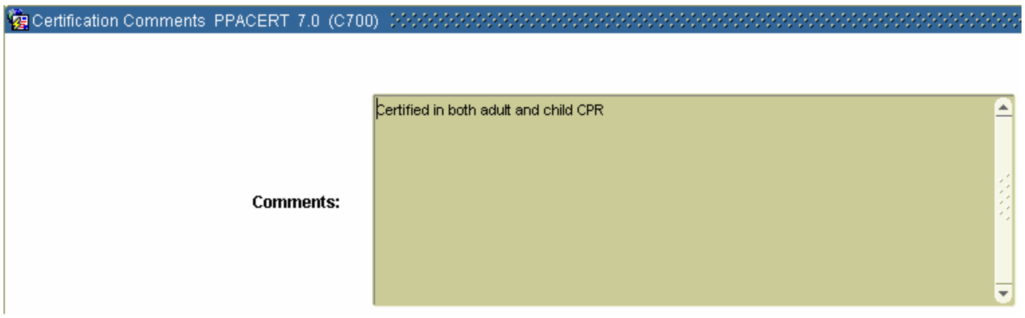
Procedure

Follow these steps to enter certificate information.

Step	Action
1	Access the Certification Information Form (PPACERT).
2	Enter your person’s ID in the **ID** field or perform a search.
3	Perform a **Next Block** function.
4	Select the **Search** function in the **Certification Code** field and select a code from the Certification Code Rule Form (PTRCERT).
5	Enter the license/certification number in the **Certification Number** field.
6	Enter the date that your person was certified in the **Certification Date** field.
7	Enter the next date that the person will be certified in the **Next Certification Date** field.
8	Enter the date that the certification will expire in the **Expire Date** field.
9	Double-click in the **Status** field and select and return a License/Certification Status Validation Form (PTVLCVS).
10	Double-click in the **State/Province** field and select and return the issuing State code from the State/Province Code Validation Form (STVSTAT).
11	Double-click in the **Nation/Country** field and select and return the issuing Nation code from the Nation Validation Form (STVNATN).
12	Perform a **Next Block** function.
13	Double-click the **Endorsements Code** field and select and return an Endorsement code.
14	Enter the date of the endorsement in the **Endorsement Date** field.
15	Click the **Save** icon.



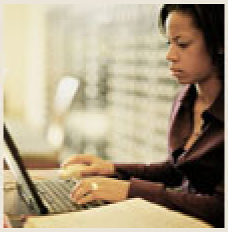
Options – Comment



Procedure

Follow these steps to add comments.

Step	Action
1	Select <u>Comment</u> from the **Options** menu.
2	Enter any free form comments (up to 2000 characters) in the **Comment** field.
3	Click the **Save** icon.
4	Click the **Exit** icon.



Section C: Day-to-Day Operations

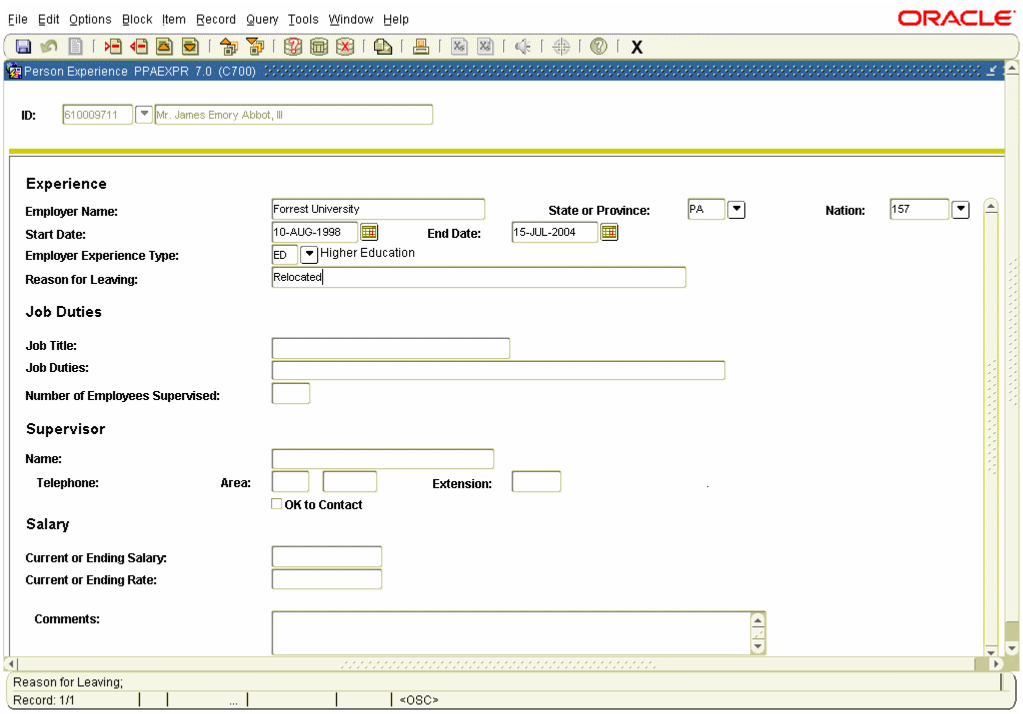
Lesson: Entering Person Experience Information

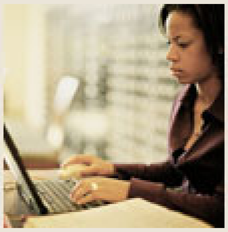
Jump to TOC

Introduction

The Person Experience Form (PPAEXPR) maintains records on an applicant's experience and references. This form may not be required if your institution has resume imaging software.

SCT Banner form





Section C: Day-to-Day Operations

Lesson: Entering Person Experience Information (Continued)

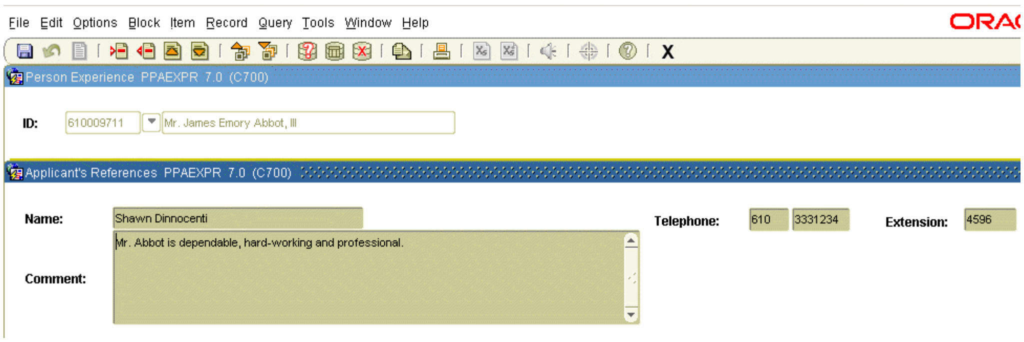
Jump to TOC

Procedure

Follow these steps to enter person experience information.

Step	Action
1	Access the Person Experience Form (PPAEXPR).
2	Enter your new person's ID in the **ID** field or perform a search.
3	Perform a **Next Block** function.
4	Enter data in the following fields within the Experience Information section: **Employer Name**, **State/Prov**, **Nation**, **Start Date**, **End**, **Empr/Exp Type** (perform a search to view the List of Values), and **Reason for Leaving**.
5	Enter data in the following fields within the Job Duties section: **Job Title**, **Job Duties**, and **# of Employees Supervised**.
6	Enter data in the following fields within the Supervisory Information section: **Name**, **Phone Number**, **OK to Contact**.
7	Enter data in the following fields within the Salary Information section: **Current Ending Salary, Current Ending Rate, Comments.**
8	Click the **Save** icon.

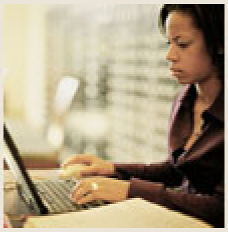
Options – Applicant's Reference



Procedure

Follow these steps to enter applicant reference information.

Step	Action
1	Select <u>Applicant's References</u> from **Options** menu.
2	Enter the name of the reference in the **Name** field.
3	Enter the phone number of the reference in the **Phone/Ext** field.
4	Enter any comments that require notation in the **Comments** field.
5	Click the **Save** icon.
6	Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Entering Medical Information

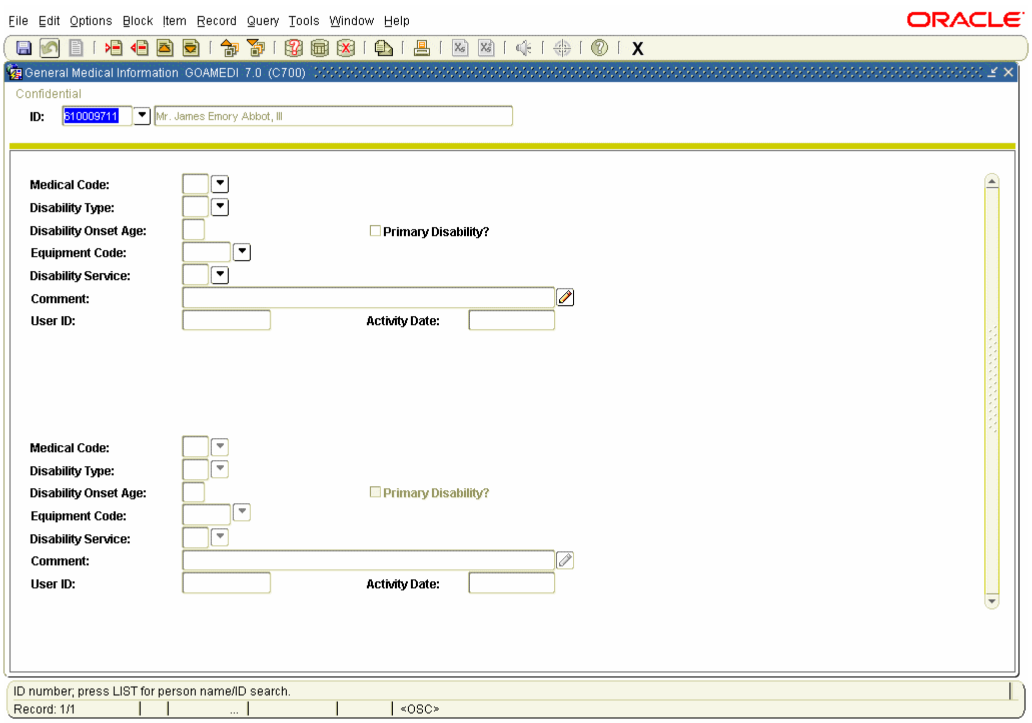
Jump to TOC

Introduction

The General Medical Information Form (GOAMEDI) enables you to enter medical information about an applicant or employee.

Note: We recognize the highly sensitive nature of this information and recommend that each institution set up enterprise-wide confidential policies to ensure only the proper access be granted to this information. Careful consideration by the institutions Data Standard Committee and periodic reviews of the policy and use of this screen after implementation are highly recommended to allow the institution to take advantage of this screen's functionality and to maintain the highest level of controlled access.

SCT Banner form



File Edit Options Block Item Record Query Tools Window Help
ORACLE
General Medical Information GOAMEDI 7.0 (C700)
Confidential
ID: 610009711 Mr. James Emory Abbot, II

Medical Code:
Disability Type:
Disability Onset Age:
Primary Disability?
Equipment Code:
Disability Service:
Comment:
User ID:
Activity Date:

Medical Code:
Disability Type:
Disability Onset Age:
Primary Disability?
Equipment Code:
Disability Service:
Comment:
User ID:
Activity Date:

ID number; press LIST for person name/ID search.
Record: 1/1 ... <OSC>

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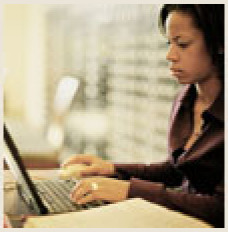
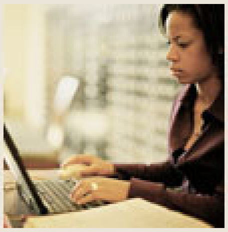


Jump to TOC

Procedure

Follow these steps to enter medical information.

Step	Action
1	Access the General Medical Information Form (GOAMEDI).
2	Enter your person's ID in the **ID** field or perform a Search.
3	Perform a **Next Block** function.
4	Double-click the **Medical Code** field and select and return a medical code.
5	Double-click in the **Disability Type** field and select a disability type.
6	Enter the age that the person was diagnosed with the disability in the **Disability Onset Age** field.
7	Click the **Primary Disability?** checkbox if this is a primary disability.
8	Double-click the **Equipment Code** field and select and return a medical equipment code.
9	Double-click in the **Disability Service** field and select a code.
10	Enter a free-form comment in the **Comment** field (up to sixty characters).
11	Click the **Save** icon.
12	Click the **Exit** icon.



Section C: Day-to-Day Operations

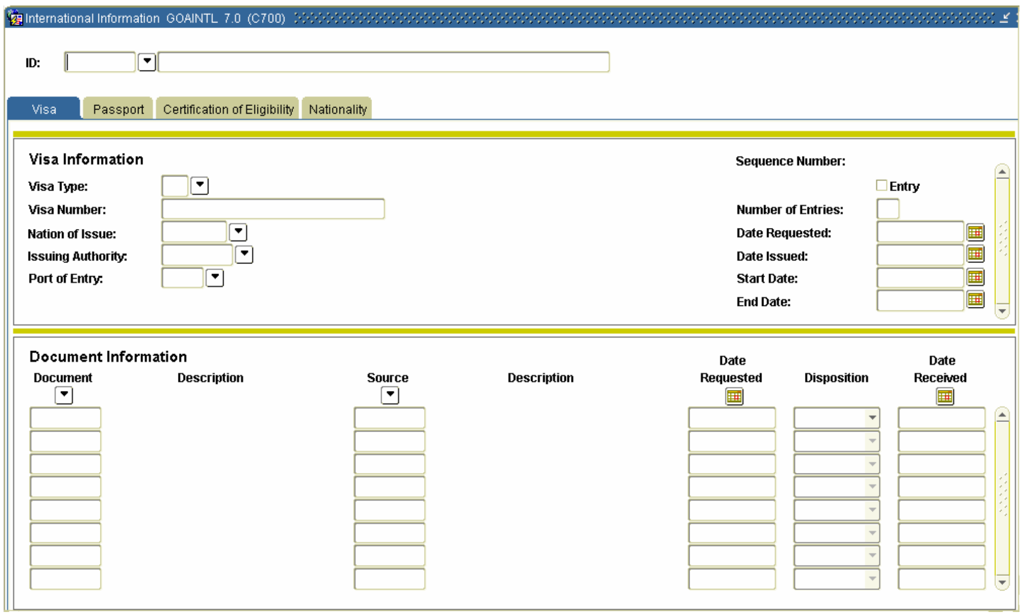
Lesson: Entering International Information

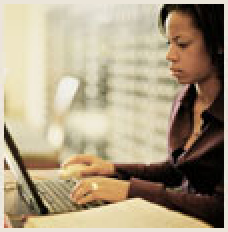
Jump to TOC

Introduction

The Visa International Information Form (GOAINTL) allows you to enter visa and nationality data for citizens of countries other than the one in which your institution is located.

SCT Banner form





Section C: Day-to-Day Operations

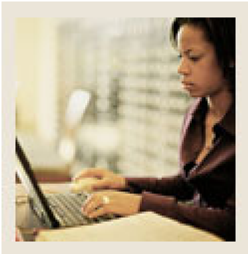
Lesson: Entering International Information (Continued)

Jump to TOC

Procedure

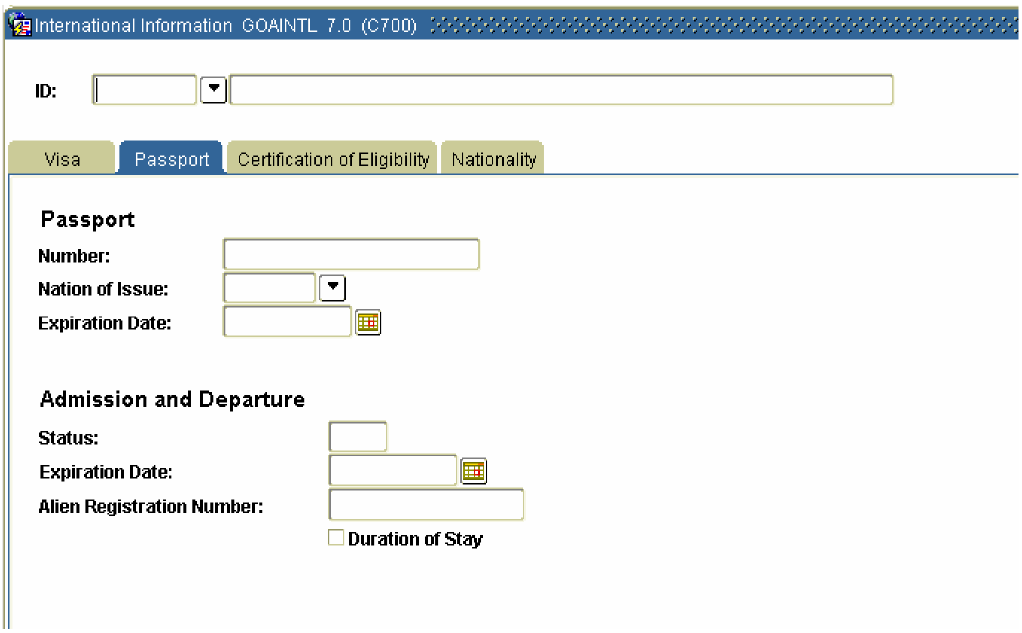
Follow these steps to enter visa information.

Step	Action
1	Access the Visa International Information Form (GOAINTL).
2	Enter your person's ID in the **ID** field or perform a **Search.**
3	Perform a **Next Block** function.
4	Double-click in the **Visa Type Code** field and select the valid Visa Type.
5	Enter the Visa number in the **Visa Number** field.
6	Double-click in the **Nation of Issue** field and select the appropriate country.
7	Double-click in the **Issuing Authority** field and select the appropriate authority.
8	Double-click in the **Port of Entry** field and select the appropriate port of entry.
9	Perform a **Next Block** function.
10	Double-click in the **Document** field, and select the appropriate document.
11	Double-click in the **Source** field and select the appropriate source.
12	Click the **Save** icon.



Jump to TOC

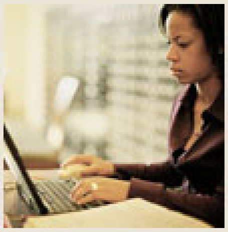
Passport tab



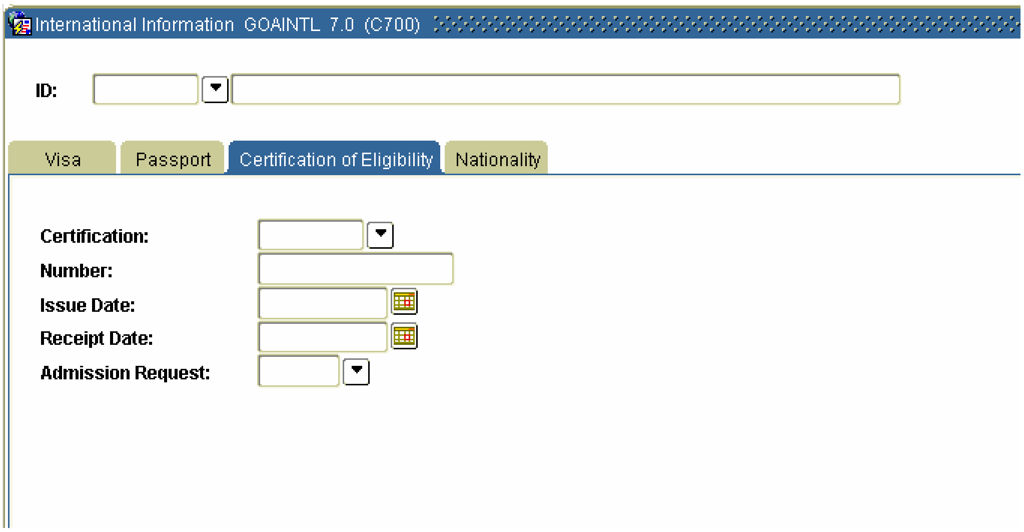
Procedure

Follow these steps to enter passport information.

Step	Action
1	Select the **Passport** tab.
2	Enter the Passport number in the **Number** field.
3	Double-click in the **Nation of Issue** field and select the country.
4	Enter the date that the passport will expire in the **Expiration Date** field.
5	Enter a three-character code denoting the status in the **Status** field.
6	Enter the expiration date of the admission/departure in the **Expiration Date** field.
7	Enter the registration number in the **Alien Registration Number** field.
8	Click the **Duration of Stay** checkbox if the visa is for the duration of the stay.
9	Click the **Save** icon.



Certification of Eligibility tab



Procedure

Follow these steps to enter certification information.

Step	Action
1	Select the **Certification of Eligibility** tab.
2	Double-click in the **Certification Code** field and select the appropriate certification of eligibility code.
3	Enter the certification number in the **Number** field.
4	Enter the date that the certification was issued in the **Issue Date** field.
5	Enter the date that the certification was received in the **Receipt Date** field.
6	Double-click in the **Admission Request** field and select the appropriate admission request code.
7	Click the **Save** icon.

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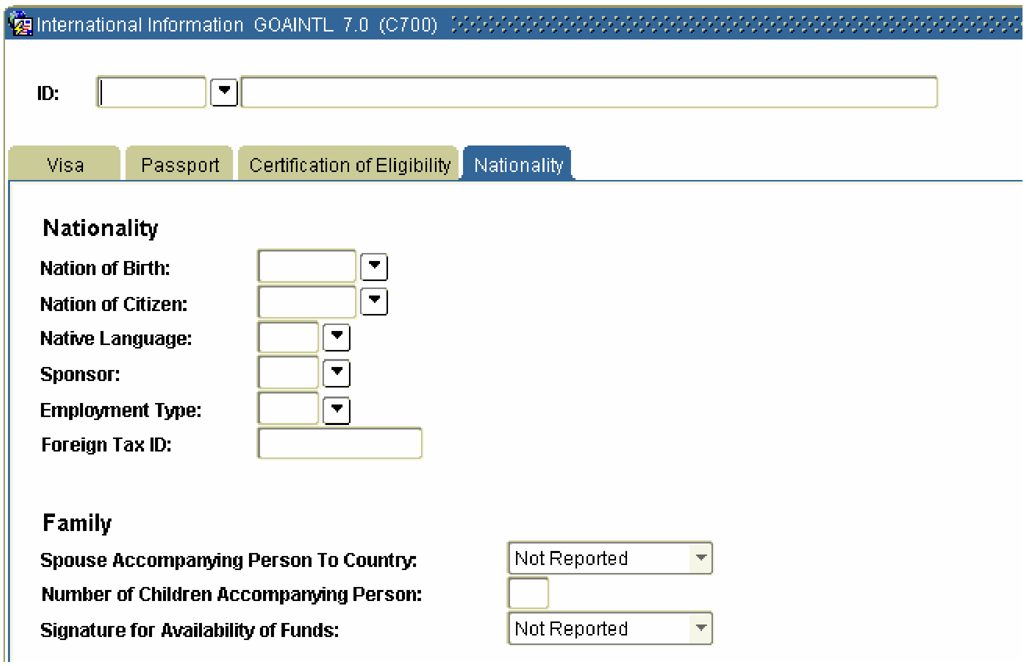
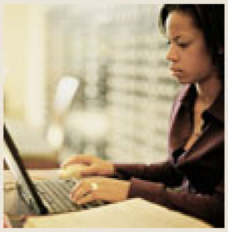
Jump to TOC

Nationality tab



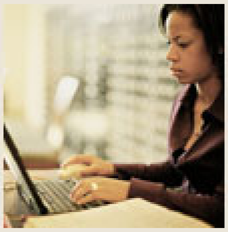


Jump to TOC

Procedure

Follow these steps to enter nationality information.

Step	Action
1	Select the **Nationality** tab.
2	Double-click in the **Nation of Birth** field and select the country where the person was born.
3	Double-click in the **Nation of Citizenship** field and select the country where the person is a citizen.
4	Double-click in the **Native Language** field and select the person’s native language.
5	Double-click in the **Sponsor** field and select the sponsoring organization.
6	Double-click in the **Employment Type** field and select the type of employment.
7	Enter the foreign tax ID number in the **Foreign Tax ID** field.
8	Select *Not Reported*, *Yes*, or *No* from the drop-down list in the **Spouse Accompany Person to County** field.
9	Enter the number of children that are accompanying the person in the **Number of Children Accompanying Person** field.
10	Select *Not Reported*, *Yes*, or *No* from the drop-down list in the **Signature of Availability of Funds** field.
11	Click the **Save** icon.
12	Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Entering E-mail Information

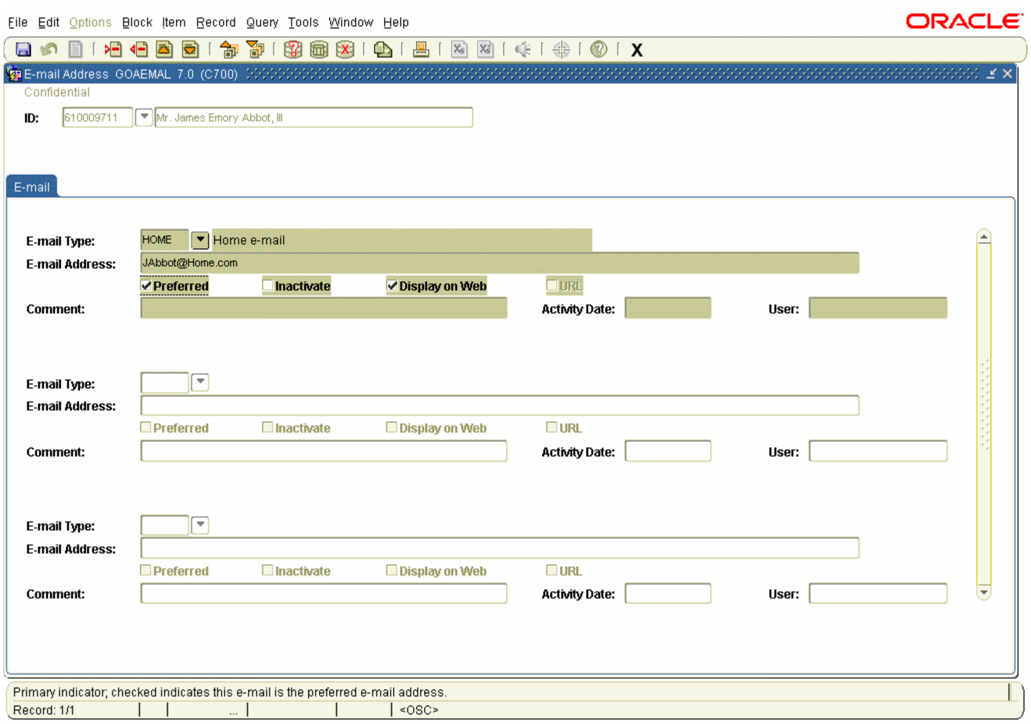
Jump to TOC

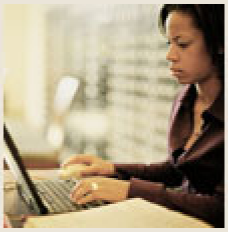
Introduction

The E-mail Address Form (GOAEMAL) displays and maintains e-mail addresses for any person who has an ID in your database. Employees can access their information from this form online when using the Employees Self Service product.

Note: You can enter a person's e-mail address on PPAIDEN when you set them up initially. This form is useful when you need to update an e-mail address.

SCT Banner form





Section C: Day-to-Day Operations

Lesson: Entering E-mail Information (Continued)

Jump to TOC

Procedure

Follow these steps to enter e-mail address information.

Step	Action
1	Access the E-mail Address Form (GOAEMAL).
2	Enter your person's ID in the **ID** field or perform a search.
3	Perform a **Next Block** function.
4	Double-click the **E-mail Type** field and select and return an E-mail Type code.
5	Enter the person's email address in the **E-mail Address** field.
6	Check the **Preferred** checkbox if this is the person's preferred e-mail address. Note: Only one e-mail address can be selected as preferred. If a preferred address becomes inactive, the preferred status is removed.
7	Tab over the **Inactive** field.
8	Click the **Display on Web** checkbox if you want the person's e-mail address to appear on the web.
9	Enter any comments about this e-mail address in the **Comments** field.
10	Click the **Save** icon.
11	Click the **Exit** icon.

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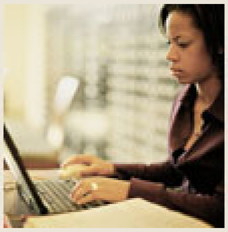


Section C: Day-to-Day Operations

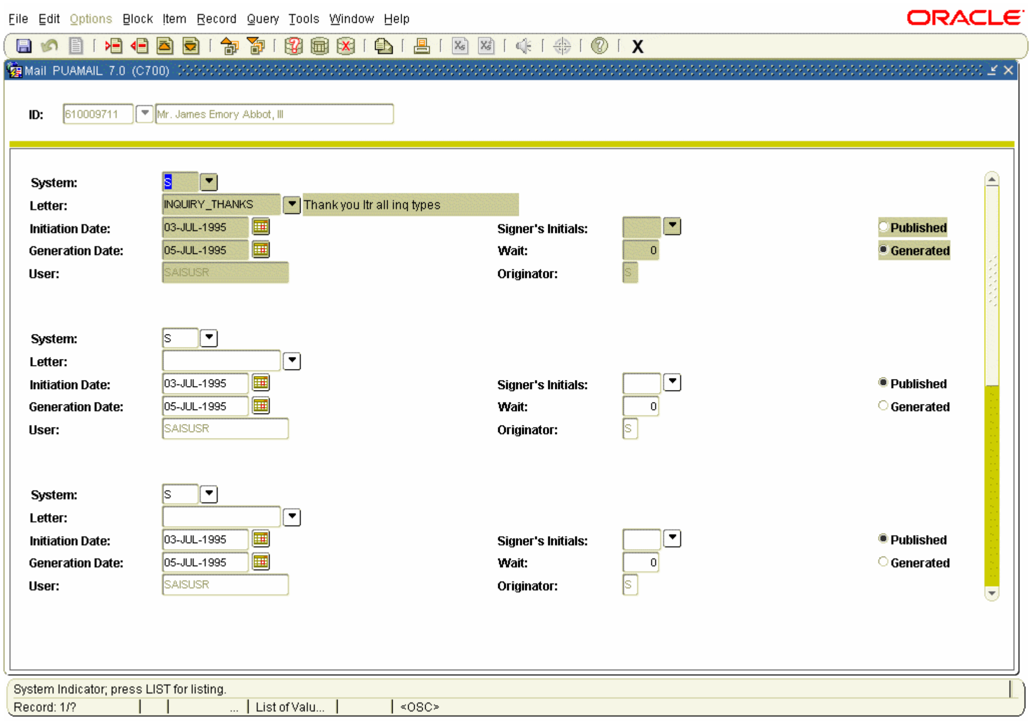
Lesson: Entering Correspondence Information

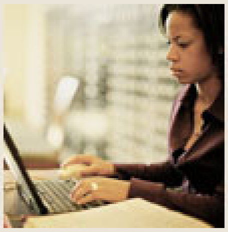
Jump to TOC

Introduction

The Mail Form (PUAMAIL) displays and maintains correspondence records.

SCT Banner form





Jump to TOC

Procedure

Follow these steps to maintain correspondence records.

Step	Action
1	Access the Mail Form (PUAMAIL).
2	Enter your person’s ID in the **ID** field or perform a Search.
3	Perform a **Next Block** function.
4	Double-click the **System** field and select a System Indicator code (i.e. H – Human Resources).
5	Double-click the **Letter** field and select and return a Letter code.
6	Enter the date that the letter was initiated in the **Initiation Date** field.
7	Enter the date that the letter was printed in the **Generation Date** field.
8	Double-click the **Signer’s Initials** field and select an Initials code.
9	Enter the number of days between initiating and printing the letter in the **Wait** field.
10	Click the **Generated** radio button.
11	Click the **Save** icon.
12	Click the **Exit** icon.

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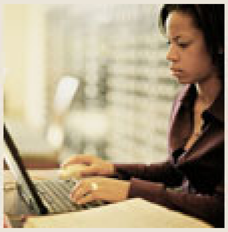


Section C: Day-to-Day Operations

Lesson: Entering Comments Information

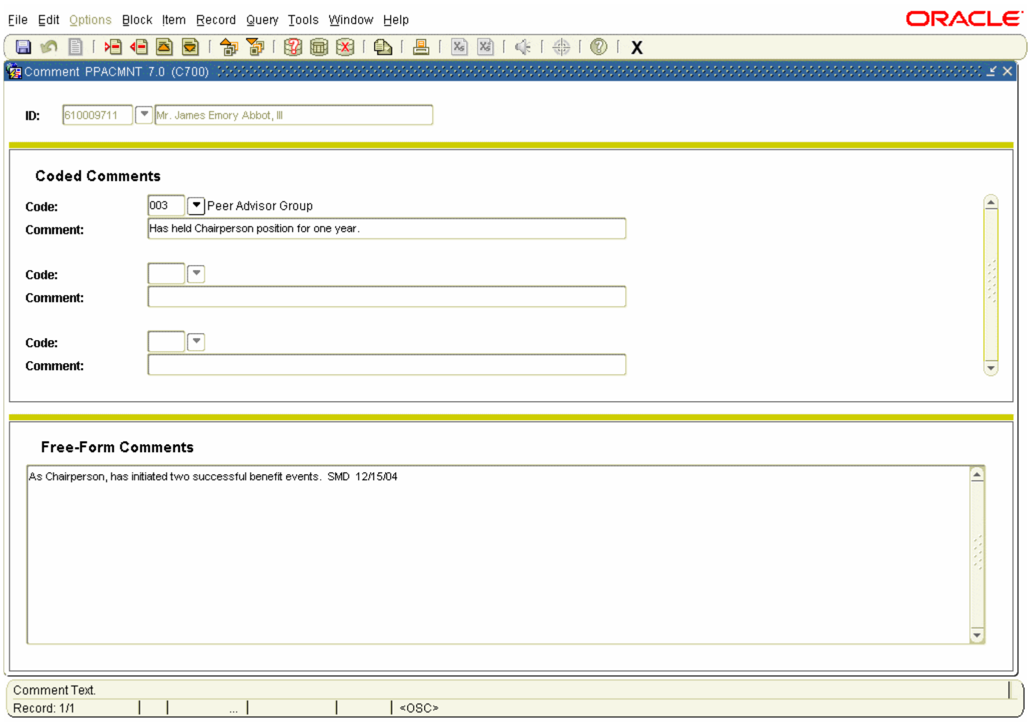
Jump to TOC

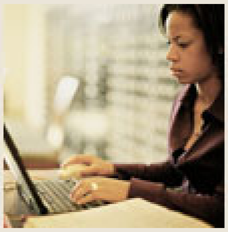
Introduction

The Comment Form (PPACMNT) enables you to enter comments about a person and to track and comment upon specific employee or applicant situations. Some examples would be: grievances, accidents, or committee memberships. Payroll uses this form for garnishments. You can also copy and paste text into the free form comments field.

Note: We suggest that free form comments be initialed and dated.

SCT Banner form





Section C: Day-to-Day Operations

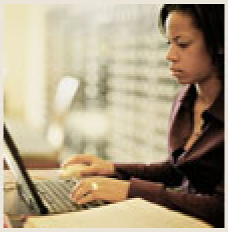
Lesson: Entering Comments Information (Continued)

Jump to TOC

Procedure

Follow these steps to enter comments.

Step	Action
1	Access the Comment Form (PPACMNT).
2	Enter your new person's ID in the **ID** field or perform a **Search.**
3	Perform a **Next Block** function.
4	Double-click the **Code** field and select a Comment Type.
5	Enter a free-form comment in the **Comment** field (up to sixty characters).
6	Enter additional text into the **Free Form Comments** field.
7	Click the **Save** icon.
8	Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Using the Quick New-Hire Set Up Procedure

Jump to TOC

Introduction

The New Hire Form (PEAHIRE) provides a simple, efficient method to establish an employee in the system. The form utilizes the default functionality with SCT Banner HR and requires only a minimum amount of data to be entered. All information entered on this form will automatically be entered in the Person Identification Form (PPAIDEN), the Employee Form (PEAEMPL), and the Employee Job Form (NBAJOBS).

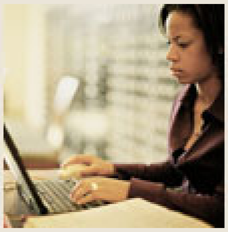
PEAHIRE provides a method to enter records for new employees. It does not allow maintenance of existing employee records. All maintenance must be performed on the appropriate application form (PPAIDEN, PEAEMPL, NBAJOBS, PDADEDN, or PEAESCH).

When to Use PEAHIRE

The PEAHIRE form can be used *only* for new employees. It cannot be used for current employees, previously terminated employees, or deceased employees.

If a Person Identification Form (PPAIDEN) was previously completed for the employee, any information on the associated employee record is displayed in the corresponding fields of PEAHIRE. This information is *display only* on PEAHIRE. Any updates to this data must be made on PPAIDEN.

IF you want to…	THEN use…
Set up a new employee with minimal personal information and link to a job immediately.	PEAHIRE
Set up a new employee with detailed personal information and link to a job later.	PPAIDEN Note: You can use the PEAHIRE form to link a person to a job without having to re-enter data submitted through PPAIDEN.
Update information about a person.	PPAIDEN



Section C: Day-to-Day Operations

Lesson: Using the Quick New-Hire Set Up Procedure (Continued)

Jump to TOC

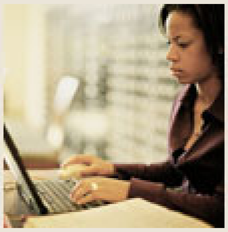
PEAHIRE Process Overview

When using PEAHIRE to set up a new employee in SCT Banner, you will be prompted to enter the following information:

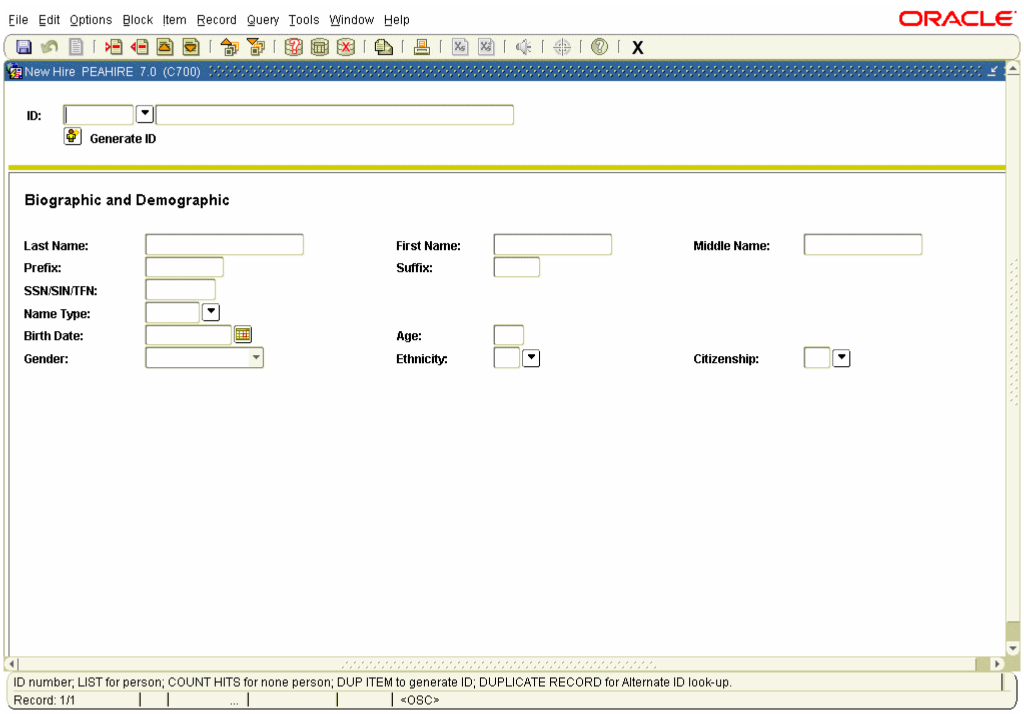
- new person record information
- biographical information
- address and telephone information
- employee information
- job information

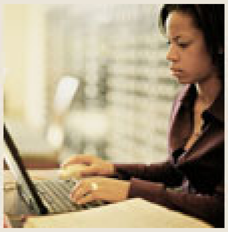
If you have already entered information in PPAIDEN, then use the Search function to access the person you want to link to a job. Review information previously entered and perform a **Next Block** function until you are able to enter the employee information.

All null fields on PEAHIRE must be completed as described below. If you are creating a new record (that is, if a PPAIDEN form was not completed for the employee), all fields on PEAHIRE will be null and must be completed as described on the next page.



SCT Banner form



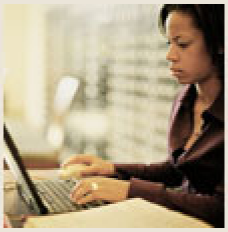


Procedure

Follow these steps to set up a new hire.

Note: This following procedure assumes that Common Matching is turned on.

Step	Action
1	Access the New Hire Form (PEAHIRE).
2	Select the **Generate ID** function. Notes: If the person was an applicant prior to being hired, use the Employee Search Form (POIIDEN). If applicant tracking is not used at your institution, use the Person Search Form (SOAIDEN). If you know the person's ID, enter it in the ID field. When you click the **Generate ID** icon, a more detailed form will open so that you can enter information about the new employee. The word "Generated" defaults to the **ID** field. This does not change until the record is **Save**d.
3	Select a matching source in the **Matching Source** field from the drop-down list.
4	Enter the person's last name in the **Last Name** field. Note: As per the institution's data standards, enter the Last Name *exactly* as it appears on the Social Security Card for payroll purposes.
5	Enter the person's first name in the **First Name** field.
6	Optional - enter the person's middle name in the **Middle Name** field.
7	Double-click in the **Address Type** field and select the code identifying the type of address. Note: SCT Banner defaults to the home address.
8	Enter the employee's address in the **Address** field. Note: Address Line 1 is required.
9	Enter the city associated with the address in the **City** field.
10	Double-click the **State or Province** field and select the state or province code.
11	Enter the zip code in the **ZIP or Postal Code** field. Note: You may also double-click the **ZIP or Postal Code** field and select the zip/postal code associated with the address. A search function is available.



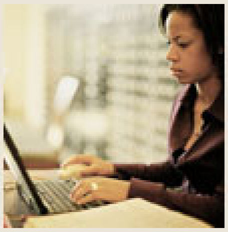
Section C: Day-to-Day Operations

Lesson: Using the Quick New-Hire Set Up Procedure (Continued)

Jump to TOC

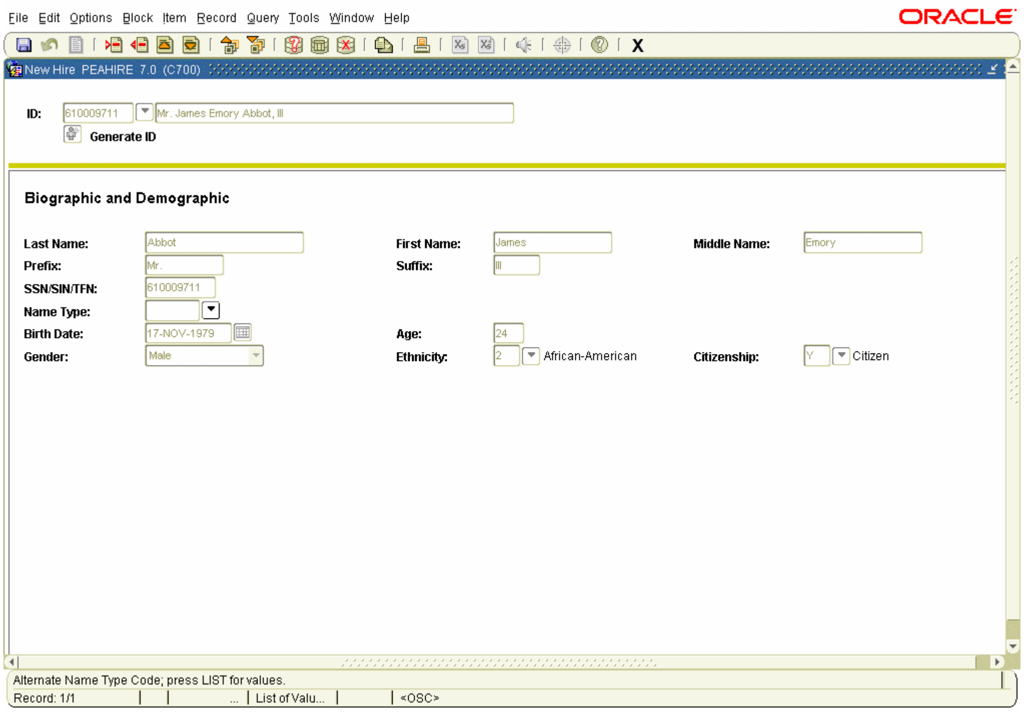
Procedure, continued

Step	Action
12	Optional – double-click the **County** field and select and return the county associated with the address.
13	Optional- Enter “157” in the **Nation** field for the United States of America. Note: You can also double-click the **Nation** field and select the country code associated with the address. This is only required if the State/Province field is not complete.
14	Enter the employee’s social security number in the **SSN/SFN/TFN** field.
15	Enter the employee’s date of birth in the **Birth Date** fields. Warning: The fields appear in Day/Month/Year order. Be careful to enter the day prior to the month.
16	Select the employee’s gender in the **Gender** field.
17	Double-click the **E-mail Type** field and select an E-mail type code.
18	Enter the person’s email address in the **E-mail** field.
19	Double-click the **Telephone Type** field and select a telephone type.
20	Enter the employee’s phone number in the **Area Code/Phone Number/Extension** field.
21	Click the **Duplicate Check** icon.
22	Click **Yes** to create a new record.
23	Click **OK**.



Jump to TOC

Biographic and Demographic screen



Note: Use PPAIDEN to change information displayed on this screen.

Procedure

Follow these steps to enter biographic and demographic information.

Step	Action
1	Perform a **Next Block** function.
2	Optional – enter the prefix associated with the employee's name in the **Prefix** field (i.e. Mr., Mrs., Dr.)
3	Double-click the **Name Type** field and select a name type code.
4	Double-click the **Ethnicity** field and select an ethnic code.
5	Double-click the **Citizenship** field and select a citizenship code. Note: After completing the fields on this screen, the Address and Telephone screen opens.

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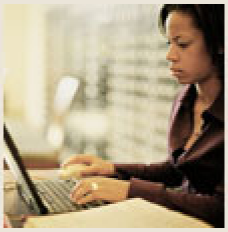
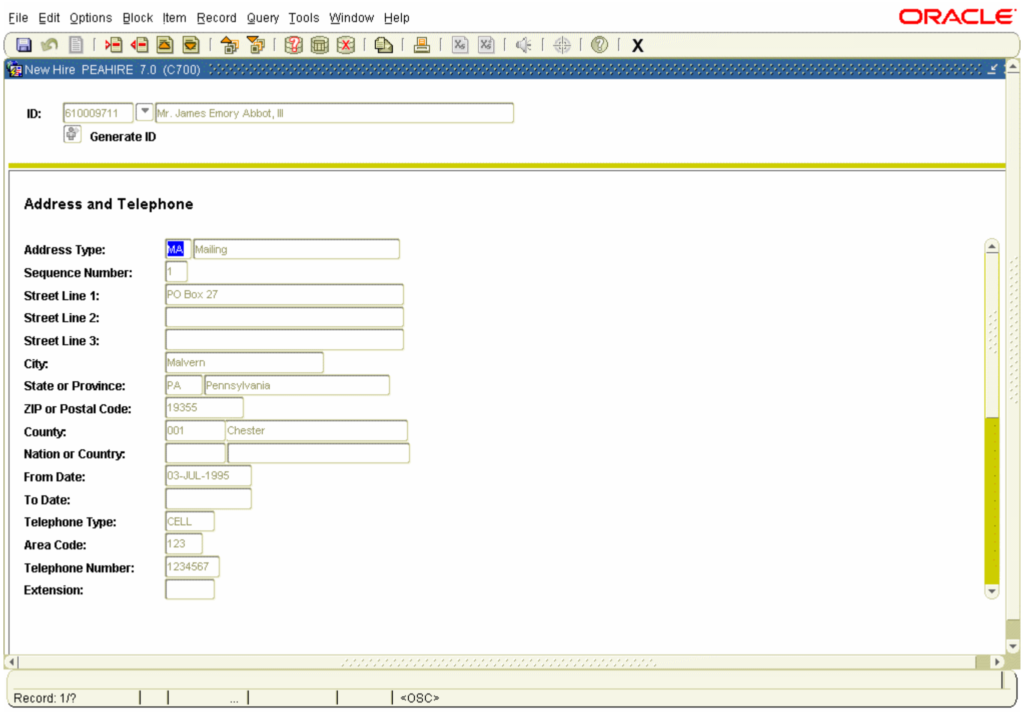
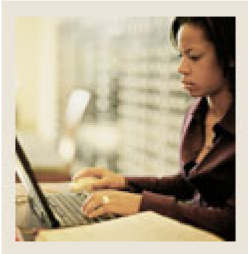


Jump to TOC

Address and Telephone screen



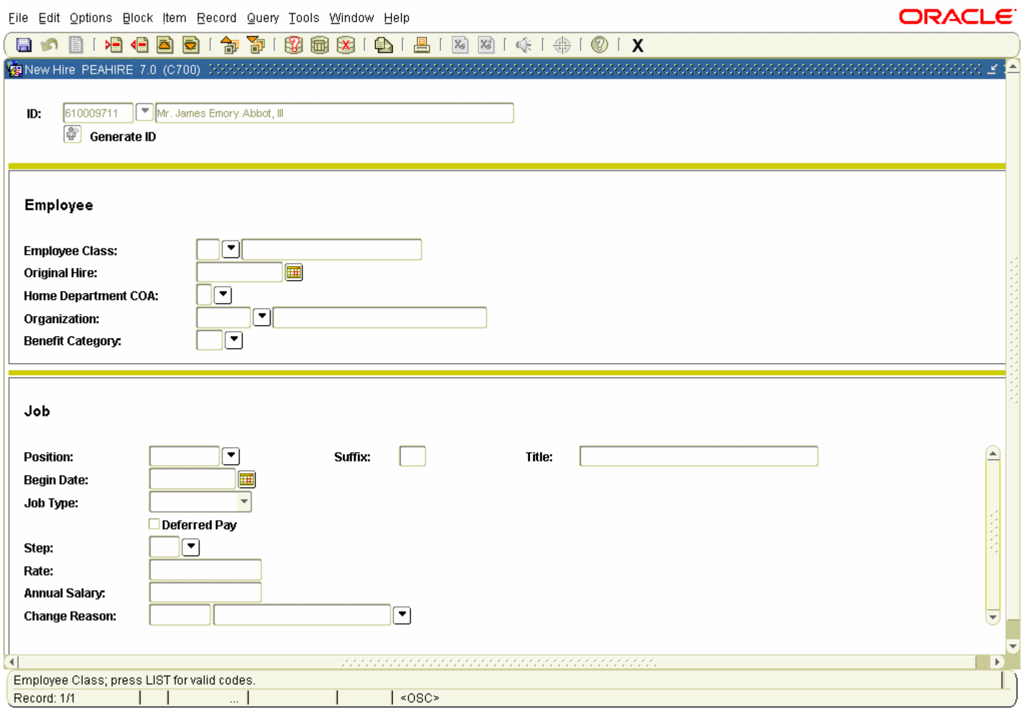
Step	Action
1	Perform a **Next Block** function to continue. Note: This screen is for review only, to update address or telephone information, use PPAIDEN.



Lesson: Using the Quick New-Hire Set Up Procedure (Continued)

Jump to TOC

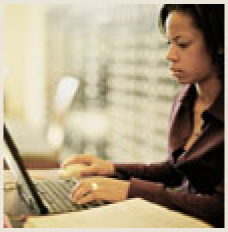
Employee and job information screen



Procedure

Follow these steps to enter job information.

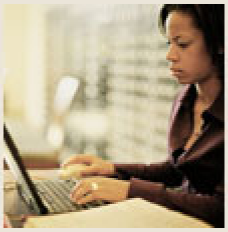
Step	Action
1	Select the **Search** button in the **Employee Class** field and return the appropriate one.
2	Enter the appropriate date in **Original Hire Date** field.
3	Select the **Search** function in the **Home Department COA** field and select the appropriate code.
4	Select the **Search** function in the **Organization** field and select the appropriate organization.
5	The **Benefit Category** field will populate automatically from the employee class. If you need to override the category, double click in the **Benefit Category** field and select the appropriate code.
6	Move to the **Next Block** and enter Job Information.
7	Select the **Search** function in the **Position** field and select the available positions.



Procedure

Follow these steps to complete the process.

Step	Action
8	Enter the suffix number in the **Suffix** field.
9	Verify the title. <u>Note</u>: The title in the **Title** field will be displayed based on the position number. If you need to override it you can do so here.
10	Enter the date the job is starting in the **Job Begin Date**.
11	Select a job type from the drop-down list in the **Job type** field.
12	Click the **Deferred Pay** checkbox if this job will be on a deferred pay cycle.
13	Enter a step in the **Step** field. <u>Note:</u> If there is no step, enter a *0*.
14	Enter the hourly rate if the job is hourly in the **Hourly Rate** field.
15	Enter the annual salary if the job is salary in the **Annual Salary** field.
16	Enter the appropriate job change reason in the **Change Reason** field. <u>Note</u>: For this exercise it would be *NEW*, or the code that your school has created.
17	Click the **Save** icon. <u>Notes</u>: After clicking the **Save** icon, the system will call each of the related application forms, insert the data you have entered into the associated fields, and place default values into the remaining fields. When the **Save** process is complete, the Auto/Hint will display *New Hire Process Complete*. At this point, all of the selections on the Options menu are enabled.



Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

When is the SSN/SIN/TFN field on PPAIDEN required?

a) Before the person is defined on the system
b) When the person is being defined in the system as an employee
c) The SSN/SIN/TFN is not required on PPAIDEN
d) When the person is being defined in the system as a person

Question 2

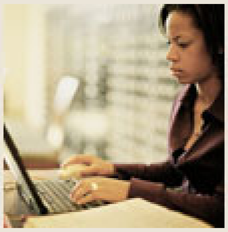
The New Hire Form (PEAHIRE) form can be used only for new employees.

True or False

Question 3

Which fields are required in PPAIDEN when a person is being defined as an employee?

a) Birth date, ethnicity, last name, gender, and address
b) Birth date, ethnicity, first name, last name, SSN, address, citizenship code and gender
c) Birth date, first name, last name, SSN, address, and gender
d) Birth date first name, last name, SSN, and gender



Section C: Day-to-Day Operations

Lesson: Self Check (Continued)

Jump to TOC

Question 4

It is after hours and someone needs to reach Professor Anderson. They are requesting her home phone number. How do you determine if Professor Anderson will allow this number to be released, without calling her?

Question 5

Match the following forms to their description:

a. PPACMNT	_______	Certification Information Form
b. PPAEXPR	_______	General Medical Information Form
c. PPAGENL	_______	Mail Form
d. PPACERT	_______	Comment Form
e. PPASKIL	_______	Person Experience Form
f. PPAIDEN	_______	E-mail Address Form
g. GOAMEDI	_______	Employee Skill Form
h. PUAMAIL	_______	General Information Form
i. GOAEMAL	_______	Person Identification Form

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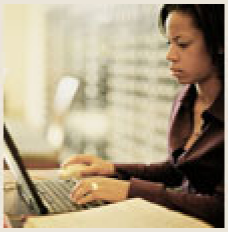


Section C: Day-to-Day Operations

Lesson: Answer Key

Jump to TOC

Question 1

When is the SSN/SIN/TFN field on PPAIDEN required?

a) Before the person is defined on the system
b) When the person is being defined in the system as an employee
c) The SSN/SIN/TFN is not required on PPAIDEN
d) When the person is being defined in the system as a person

Question 2

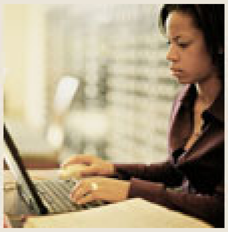
The New Hire Form (PEAHIRE) form can be used only for new employees.

True

Question 3

Which fields are required in PPAIDEN when a person is being defined as an employee?

a) Birth date, ethnicity, last name, gender, and address
b) Birth date, ethnicity, first name, last name, SSN, address, citizenship code and gender
c) Birth date, first name, last name, SSN, address, and gender
d) Birth date first name, last name, SSN, and gender



Jump to TOC

Question 4

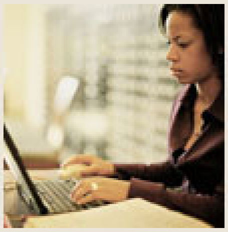
It is after hours and someone needs to reach Professor Anderson. They are requesting her home phone number. How do you determine if Professor Anderson will allow this number to be released, without calling her?

Biographical tab of PPAIDEN.

Question 5

Match the following forms to their description:

a. PPACMNT	___**D**____	Certification Information Form
b. PPAEXPR	___**G**____	General Medical Information Form
c. PPAGENL	___**H**____	Mail Form
d. PPACERT	___**A**____	Comment Form
e. PPASKIL	___**B**____	Person Experience Form
f. PPAIDEN	___**I**_____	E-mail Address Form
g. GOAMEDI	___**E**____	Employee Skill Form
h. PUAMAIL	___**C**____	General Information Form
i. GOAEMAL	___**F**____	Person Identification Form



Section C: Day-to-Day Operations

Lesson: Appendix A – Reports

Jump to TOC

Introduction

The following describes the reports that support Recruitment and Applicant Tracking. For more specific information about these reports, please refer to Chapter 20, Reports and Processes, in the SCT Banner Human Resources User manual.

Reports

The following chart lists the report, its SCT Banner name and its functionality.

Report Name	SCT Banner Name	Functionality
Skills Inventory Report	PPRSINV	Lists employees with special skills or skill combinations.

Section D: Reference

Lesson: Overview

Jump to TOC

Introduction

The purpose of this section is to provide reference materials related to the workbook.

Section contents

Jump to TOC

Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Form Name	Code	Form Name	Code
Certification Code	PTRCERT	Certification Information Form	PPACERT
Ethnic Code	PTRETHN	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
Exam Code	PTREXAM	Person Skills Form	PPASKIL
Skill Code	PTRSKIL	Person Skills Form	PPASKIL
Skill Level	PTRSKLV	Person Skills Form	PPASKIL
Chart of Accounts Code	FTVCOAS	New Hire Form	PEAHIRE
Organization Code	FTVORGN	New Hire Form	PEAHIRE
E-mail Address Type Code	GTVEMAL	E-Mail Address Form	GOAEMAL
Letter Code	GTVLETR	Mail Form	PUAMAIL
Name Type Code	GTVNTYP	New Hire Form	PEAHIRE
Zip/Postal Code	GTVZIPC	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
Comment Code	PTVCMTY	Comment Form	PPACMNT
EEO Ethnic Code	PTVEEOC	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
Endorsement Code	PTVENDS	Certification Information Form	PPACERT
License/Certification Status Validation	PTVLCSV	General Information Form	PPAGENL
		Certification Information Form	PPACERT
		Visa International Form	GOAINTL
Publication Code	PTVPUBT	General Information Form	PPAGENL
Address Type Code	STVATYP	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
Citizen Type Code	STVCITZ	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
		Visa International Form	GOAINTL
County Code	STVCNTY	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE

Guide, continued

Setup Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Degree Code	STVDEGC	General Information Form	PPAGENL
Degree Level Code	STVDLEV	General Information Form	PPAGENL
Ethnic Codes	STVETHN	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
Initials Code	STVINIT	Mail Form	PUAMAIL
Language Code	STVLANG	Visa International Form	GOAINTL
Major/Minor/Concentration Code	STVMAJR	General Information Form	PPAGENL
Medical Code	STVMEDI	General Medical Information Form	GOAMEDI
Martial Status Code	STVMRTL	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
Nation Code	STVNATN	Identification Form	PPAIDEN
		New Hire Form	PEAHIRE
		Certification Information Form	PPACERT
		Visa International Form	GOAINTL
Port of Entry Code	STVPENT	Visa International Form	GOAINTL
Relation Code	STVRELT	Identification Form	PPAIDEN
Source/Background Institution Code	STVSBGI	General Information Form	PPAGENL
State/Province Code	STVSTAT	Identification Form	PPAIDEN
		Person Experience Form	PPAEXPR
		General Information Form	PPAGENL
		Certification Information Form	PPACERT
		New Hire Form	PEAHIRE
Telephone Type	STVTELE	Telephone Form	PPATELE
Visa Type Code	STVVTYP	Visa International Information Form	GOAINTL

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Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed

Jump to TOC

Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Identification Form (PPAIDEN)	• Ethnic Code Rule Form (PRTETHN) • Name Type Code Validation Form (GTVNTYP) • Zip/Postal Code Validation Form (GTVZIPC) • EEO Ethnic Code Validation Form (PTVEEOC) • Ethnic Code Validation Form (STVETHN) • Address Type Code Validation Form (STVATYP) • Citizen Type Code Validation Form (STVCITZ) • County Code Validation Form (STVCNTY) • Martial Status Code Validation Form (STVMRTL) • Nation Code Validation Form (STVNATN) • State/Province Code Validation Form (STVSTAT) • Relation Code Validation Form (STVRELT)
Person Skills Form (PPASKIL)	• Exam Code Rule Form (PTREXAM) • Skill Code Rule Form (PTRSKIL) • Skill Level Rule Form (PTRSKLV)
Comment Form (PPACMNT)	• Comment Code Validation Form (PTVCMTY)
Person Experience Form (PPAEXPR)	• State/Province Code Validation Form (STVSTAT)
General Information Form (PPAGENL)	• License/Certification Status Validation Form (PTVLCSV) • Publication Code Validation Form (PTVPUBT) • Degree Code Validation Form (STVDEGC) • Degree Level Code Validation Form (STVDLEV) • Major/Minor/Concentration Code Validation Form (STVMAJR) • Source/Background Institution Code (STVSBGI) • State/Province Code Validation Form (STVSTAT) • Nation Code Validation Form (STVNATN)

Jump to TOC

Guide, continued

Day-to-Day Form	Setup Forms Needed
Certification Information Form (PPACERT)	• Certification Code Rule Form (PTRCERT) • License/Certification Status Validation Form (PTVLCSV) • State/Province Code Validation Form (STVSTAT) • Nation Code Validation Form (STVNATN) • Endorsement Code Validation Form (PTVENDS)
Telephone Form (PPATELE)	• Telephone Type Validation Form (STVTELE)
General Medical Information Form (GOAMEDI)	• Medical Code Validation Form (STVMEDI)
Mail Form (PUAMAIL)	• Letter Code Validation Form (GTVLETR) • Initials Code Validation Form (STVINIT)
E-Mail Address Form (GOAEMAL)	• E-Mail Address Type Code (GTVEMAL)
New Hire Form (PEAHIRE)	• Ethnic Code Rule Form (PTRETHN) • Chart of Accounts Code (FTVCOAS) • Organization Code Validation Form (FTVORGN) • Name Type Code Validation Form (GTVNTYP • Zip/Postal Code Validation Form (GTVZIPC) • EEO Ethnic Code Validation Form (PTVEEOC) • Address Type Code Validation Form (STVATYP) • Citizen Type Code Validation Form (STVCITZ) • County Code Validation Form (STVCNTY) • Ethnic Code Validation Form (STVETHN) • Martial Status Code Validation Form (STVMRTL) • Nation Code Validation Form (STVNATN) • State/Province Code Validation Form (STVSTAT)
Visa International Information Form (GOAINTL)	• License/Certification Status Validation Form (PTVLCSV) • Citizen Type Code Validation Form (STVCITZ) • Language Code Validation Form (STVLANG) • Nation Code Validation Form (STVNATN) • Port of Entry Code Validation Form (STVPENT) • Visa Type Code Validation Form (STVVTYP)

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Section D: Reference

Lesson: Forms Job Aid

Jump to TOC

Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
PTRCERT	Certification Code	
PTRETHN	Ethnic Code	
PTREXAM	Exam Code	
PTRSKIL	Skill Code	
PTRSKLV	Skill Level	
FTVCOAS	Chart of Accounts Code	
FTVORGN	Organization Code	
GTVEMAL	E-mail Address Type Code	
GTVLETR	Letter Code	
GTVNTYP	Name Type Code	
GTVSYSI	System Indicator	
GTVZIP	Zip/Postal Code	
PTVCMTY	Comment Code	
PTVEEOC	EEO Ethnic Code	
PTVENDS	Endorsement Code	
PTVLCSV	License/Certification Status Validation	
PTVPUBT	Publication Code	
STVATYP	Address Type Code	
STVCITZ	Citizen Type Code	
STVCNTY	County Code	
STVDEGC	Degree Code	
STVDLEV	Degree Level Code	
STVETHN	Ethnic Codes	
STVINIT	Initials Code	
STVLANG	Language Code	
STVMAJR	Major/Minor/Concentration Code	
STVMEDI	Medical Code	
STVMRTL	Martial Status Code	
STVNATN	Nation Code	

Guide, continued

Form Name	Form Description	Owner
STVPENT	Port of Entry Code	
STVRELT	Relation Code	
STVSBGI	Source/Background Institution Code	
STVSTAT	State/Province Code	
STVTELE	Telephone Type	
STVVTYP	Visa Type Code	
PPAIDEN	Identification Form	
PPASKIL	Person Skills Form	
PPACMNT	Comment Form	
PPAEXPR	Person Experience Form	
PPAGENL	General Information Form	
PPACERT	Certification Information Form	
PPATELE	Telephone Form	
GOAMEDI	General Medical Information Form	
PUAMAIL	Mail Form	
GOAEMAL	E-Mail Address Form	
PEAHIRE	New Hire Form	
GOAINTL	Visa International Information Form	

Release Date

Jump to TOC

This workbook was last updated on 11/03/2005.